

REQUEST FOR PROPOSAL

Curriculum, Catalog, & Course Scheduling Management Tool

FSU-RFP-18-04

October 30, 2017

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1 Overview

Framingham State University (FSU) invites qualified vendors to submit a curriculum, catalog, and course scheduling management tool proposal. The University is currently accepting competitive proposals for a curriculum, catalog, and course scheduling management tool at the University as indicated in the Scope of Work section of this Request for Proposal (RFP). Our objective is for the University to secure the services of a qualified vendor(s) in order to, at a minimum, meet the guidelines set forth in this RFP.

If requested, selected vendors may be asked to provide an on-site demonstration of their curriculum and catalog management tool. Proposals delivered after the deadline will be returned unopened. **Late proposals will not be considered.** FSU reserves the right to waive any informality, reject any or all proposals, or make an award as deemed in the best interest of the University and in accordance with Massachusetts General Law as applicable.

The **Request for Proposal** (RFP) document is available on COMMBUYS.com. COMMBUYS is the electronic marketplace for the Commonwealth of Massachusetts. This RFP is being posted on COMMBUYS strictly for the sake of advertising to the widest possible audience. All questions and responses to this RFP must be addressed to the University as stated below.

1.1 RFP Timeline

Listed below are the key dates for the selection process, fieldwork, and reporting.

| RFP ACTIVITY | DELIVERY DATE |
|---------------------------------|-------------------|
| RFP release date | October 30, 2017 |
| Vendor Letter of Intent | November 7, 2017 |
| Vendor Questions Due | November 14, 2017 |
| Response to Questions | November 21, 2017 |
| Vendor Written Proposals Due | November 28, 2017 |
| Vendor Presentations (OPTIONAL) | To be determined |
| Vendor selected | To be determined |
| Award Notification | To be determined |
| | |

1.2 Mandatory Email Letter of Intent

An email indicating the Vendor's intent to respond to this RFP must be received by the RFP Coordinator at the address specified in Section 10 Response, no later than the date and time listed in Section 1.1 RFP Timeline. Vendors submitting a letter/email of intent will directly receive amendments and other information regarding this RFP.

| | |
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| | Each Vendor must submit an email / letter of intent to participate. |
| | <p>Please share the following logistical information;</p> <ul style="list-style-type: none"> • Product Name, Company Name, • Representative, • Telephone, Email, Postal Address, |
| | |
| | <p>Mail to: John Budron Director of Procurement and Contracts 100 State Street Framingham, MA 01701</p> |
| | |
| | <p>Attention: John Budron Email: jbudron@framingham.edu</p> |
| | |
| 1.3 Questions | |
| | <p>Questions related to this RFP are to be submitted to the Business Office via e-mail to jbudron@framingham.edu. All questions must clearly <u>reference #RFP-RFP-18-04 Curriculum and Catalog Management Tool</u> and shall be submitted by November 28th in order to be considered. Bidders shall not, under any circumstance, contact (directly or indirectly) any other person within the University in regards to this RFP.</p> |
| | <p>No oral interpretations of this solicitation shall be material to the procurement process. All material communications between the Framingham State University Business Office and potential respondents shall be in writing, as provided for in this RFP. Answers to questions will be remitted to all entities having requested the proposal as an Addendum to this RFP.</p> |
| 1.4 Optional On-site Demonstrations | |
| | <p>Vendors may be required to conduct an on-site demonstration of their proposed solution, at no cost to the University prior to final vendor selection.</p> |

2 General Information

Framingham State University prepares students for a productive life, enhanced by learning and leadership that will contribute to the culturally diverse world of the twenty-first century.

Established by Horace Mann in 1839 as America's first public teacher preparation school, Framingham State University today offers undergraduate and graduate programs encompassing the arts and sciences and professional studies.

At Framingham State University teaching is the primary role of the faculty, who engage in their disciplines through instruction, scholarship and service on campus and in their professional communities. The University serves as an important educational and cultural center in the MetroWest region of Massachusetts.

A Framingham State University education cultivates thoughtful, responsible local and global citizens, prepares students for a career, and positions them for success.

Framingham State University, located just 20 miles west of Boston, is a vibrant comprehensive liberal arts institution offering 30 undergraduate degree programs in arts, humanities, science, social sciences, and professional fields. More than 6,000 students attend Framingham State, including 2,000 graduate students. Framingham State University offers graduate degrees in 28 fields, including an extensive graduate program for teachers at international schools. The University takes pride in its 36,000 alumni, most of whom live and work in Massachusetts. The University is just the right size – small enough for learning to be personal and collaborative, yet large and diverse enough to broaden students' understanding of their world. This broadening of perspectives and appreciation of diversity is one of the hallmarks of a first-rate undergraduate education.

2.1 Guiding Principles and Prerequisites

Framingham State University

- **meet institutional goals and directives**, support and/or advance the curriculum, policy, and course scheduling processes and the direct impact with students and faculty-advisor advising and preregistration experience;
- **be reliable, with a good record of stability** and without service interruptions in context with our current and proposed future use of the system;
- **adhere to security and privacy policies and meet industry standards** so that it integrates with existing systems or future unanticipated needs.

3 Solution Scope

The solution presented should support criteria listed above and encompass the

solution and services required for implementation, support and hosting for such a curriculum and catalog management tool.

3.1 Basic Requirements

The proposed solution must:

- Integrate curriculum management and catalog management;
- Integrate with Ellucian Banner (Higher Education Data Model preferred);
- Integrate with 25Live (classroom/event space scheduling system);
- Use rules-based workflow;
- Include role-based permissions;
- Include tracking and reporting;
- Allow form-based input by faculty, department chairs/coordinators, and administrators;
- Include the ability to customize and revise forms easily;
- Allow attachment/inclusion of supplemental materials for review, such as syllabi
- Include an authorization system that tracks approval signatures and alerts users that signatures are needed;
- Track changes to courses and programs made during short-term review processes prior to formal approval so that changes in-process are visible to stakeholders;
- Provide a history of changes to and/or archiving of approved courses and programs that is accessible to individual faculty users, faculty governance, and administrators;
- Provide communication tools that update stakeholders on changes to courses and programs; and
- Generate clear reports of the curriculum and catalog changes made in any given academic year.

The proposed solution may include the following desired features:

- Integrate with Xtender (electronic document management system), Argos (report management system); DegreeWorks (degree audit), College Scheduler (Student Schedule Planner), Percussion (web-page management tool) and University ELearning Platform (Blackboard).
- Course Section/Schedule Management.
- Course Syllabi Management.

3.2 Hosting Requirements

- Provide a secure hosting solution
- Support analytic tools and usage information

- Support Emerging platform standards
- Provide a documented backup, restore and archive policies and procedures in support of a 24/7 operation
- Provide documented disaster recovery procedures
- Provide system security provisions
- Provide data security provisions
- Provide an upgrade schedule and a published upgrade plan
- Provide a documented Service Level Agreement
- Provide storage limitations on data, bandwidth, usage, etc.
- Provide documented system monitoring procedures for system failure, environment alerts, etc.
- Provide procedures for alerting customer if/when unanticipated issues arise

4 Core Requirements

4.1 System Requirements

- Software integration with Ellucian Banner 8.9 and DegreeWorks 4.1.6. (as well as to Ellucian Banner 9.0 as the University is moving to this in 2018)
- SSO capabilities (CAS, SAML, et.
- Track Usage Statistics
- Easy end-user interface
- Allow for multiple types of devices (desktop/laptop, tablet, mobile device)
- Real-time interaction between the hosted software and Ellucian Banner
- Existing integration with Ellucian Banner Student 8.6 and Banner 8.9
- The University currently uses Banner Document Management Solution (Xtender); Percussion (Web page tool), and 25Live (Classroom/Event Space management system) as appropriate.

4.2 Standards Compliance

| | |
|---------------|--|
| LDAP | (Lightweight Directory Access Protocol) --- Access to a database of information of various types - RFC2251, 2829, 2830, and 3377 and related RFCs, active directories |
| IMAP | (Internet Message Access Protocol Version 4rev1 and better) --- allows a client to access and manipulate electronic mail messages in multiple folders on a server. RFCs 2060, 1731, 2087 (quotas), 2086 (ACLs), and related RFCs |
| SMTP | (Simple Mail Transfer Protocol) --- the basic protocol for transport of electronic mail across the internet, defined in RFC 2821, 2554 (SMTP Authentication) and related RFCs |
| SSL | (Secure Socket Layer) --- a protocol that provides for encryption of sessions |
| 508 Compliant | Meet accessibility standards set by the ADA. Accommodate Universal Design principles |

4.3 Usage Requirements

The proposed tool must be capable of supporting faculty and administrators with varying levels of responsibility for curriculum and catalog management.

4.4 Vendor Services and Support

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|--------------------|---|
| Adaptability | Vendor is willing to change or to adapt to change based on institutional needs and the evolution of the curriculum, catalog, and course scheduling environments |
| Support | Phone and email support with tracking system to follow the progress of issue resolution |
| Training Materials | Excellent printed/online (video) materials for online training sessions |
| System Resources | Contextually-appropriate help files are accessible from all pages and provide assistance for students, faculty and system administrators as appropriate |
| Hosting Solution | Solution provider will host vendor solution or provide connection to a third party solution. |
| 508 Compatibility | Transcriptions services align with accommodate universal design principals. |

5 Pricing

5.1 Itemized Pricing

Vendors shall list, in an itemized format, **all** applicable fees required to meet the requirements of this RFP including, but not limited to:

- Hardware
- Software
- Services
- Travel Costs
- Installation Fees
- Training Costs
- Warranty Costs
- Upfront, and ongoing cost

With ongoing costs broken down by:

- Licensing
- Maintenance
- Support

Framingham State University understands that not all these costs may be required in each proposal.

When applicable, Vendors shall include an estimated number of hours/days to complete the project/services described in the Scope of Work/Services section. If additional materials and labor are required to complete the project, beyond that referenced in the Scope of Work, those additions, and their related fees must be expressed in writing to FSU's Purchasing Department prior to the onset of the work or delivery of goods, and must be authorized by FSU. FSU will not be responsible for any/all hidden fees related to goods or services purchased as a result of this RFP.

Please note that pricing proposals are not opened until after the technical proposals have been reviewed by the committee and presentation (if required) have been completed.

All reference to pricing MUST be submitted in a separate sealed envelope clearly marked "#FSU-RFP-18-04 Pricing." Any reference to pricing in the Technical Proposal response shall eliminate the proposal from consideration.

6 Vendor Qualifications

6.1 General Qualifications

All Vendors must be a reputable firm which regularly provides this type of service and is capable of performing first-class work within standard industry practices. Vendors must submit company background information describing the organization, its size, and its structure.

Vendors shall provide, at a minimum, three (3) customer references that are integrated with Ellucian Banner which must include names, addresses, and appropriate contacts. (See Appendix) Also, references should be of a comparable organization and, when possible, within a close geographical area to Framingham State University.

6.2 Vendor Responsibilities

The Vendor assumes sole responsibility for the complete effort required in submitting a proposal in response to this RFP. No special consideration will be given after proposals are opened because of a Vendor's failure to be knowledgeable as to all the requirements of this RFP. By submitting a proposal in response to this RFP, the Vendor represents that it has satisfied itself, from its own investigation, as to all the requirements of this RFP.

It is the responsibility of each Vendor to do the following, before submitting their proposal:

1. Examine this RFP, including all components, thoroughly.
2. Become familiar with local conditions which may affect cost, progress, performance, and/or services described in this RFP.
3. Consider all Federal, State, and Local laws, statutes, ordinances, regulations and other applicable laws which may affect cost, progress,

- services described in this RFP.
4. Required forms listed at end of RFP.

7 Contract Provisions

When applicable:

Contracts arising as the result of this RFP shall contain contractual provisions or conditions that allow for administrative, contractual, or legal remedies in instances in which a contractor (vendor), or its subcontractor(s), violates or breaches the contract terms, and provide for such remedial actions as may be appropriate.

All contracts shall contain suitable provisions for termination by FSU, including the manner by which termination shall be affected and the basis for settlement. In addition, such contracts shall describe conditions under which the contract may be terminated for default as well as conditions where the contract may be terminated because of circumstances beyond the control of FSU.

8 Payment Terms, Inspection, Acceptance and Guarantee

FSU's standard payment terms are Net 45. However, prompt payment incentives (i.e. 2% 15, etc.) will be considered.

Payment to the vendor selected as the result of this RFP for all goods and services required in the Scope of Work/Services of this RFP shall be subject to final inspection and acceptance by FSU.

The selected vendor shall fully warrant with the manufacturer's warranty all items provided under this RFP against defects in material and workmanship. Any and all applicable warranty information, including warranty duration, associated with the goods or services required in the Scope of Work/Services of this RFP must be fully disclosed in writing and made known to FSU.

The agreement shall be for 2 years with the possibility of 3 annual extensions at the discretion of the University.

9 Proposal Preparation and Submission

9.1 Proposal Cost

Proposals submitted should be simple and economical. The cost of investigating, preparing, and submitting a proposal is the sole responsibility of the Vendor and shall not be chargeable in any manner to FSU. FSU will not reimburse any Vendor for costs associated with the preparation and submission of proposals or for expenses incurred

in making presentations, interviews, or negotiating with FSU.

9.2 Proposal Submission

Proposals should be as thorough and as detailed as possible so that FSU may properly evaluate your capabilities to provide the required goods or services. Vendors are required to submit the following information/items/documents as a complete proposal, in order, as noted below. **Technical proposals shall not exceed 35 pages in length.**

9.3 Transmittal Letter

1. Include a brief introduction of the vendor or team of vendors making the proposal. Provide primary contact information including Phone number, FAX number, and email address.

2. Identify all elements of your solution.

3. Using a Cover Page, share the following logistical information: Product Name, Company Name, Representative, Telephone, Email, Postal Address, Company Background (Time in business, clientele, service coverage, sustainability).

As part of your proposal include additional information regarding experience and expertise of the firm relative to the scope of services contained in this RFP. This section should contain:

- Names and experiences (see second bullet point) of the implementation staff that will be delivering the proposed solution.
- Number of projects completed; project management experience, Ellucian Banner technical experience, number of implementations with Ellucian Banner.
- Number of institutions currently using the product.
- The size of the firm relative to the size of the scope of services.
- Geographic location of the firm relative to FSU location.
- Current workload and ability to complete projects in the required time.

4. **Please submit itemized pricing in a separate sealed envelope clearly labeled "FSU-RFP-18-04 Pricing".**

10 Response

The detailed response should address all the issues and questions in this RFP and provide a detailed timeline, and itemization of required and optional costs.

Information Package including:

- A full set of product literature including brochures and other pre-printed informational materials or a detailed description of the software and systems proposed.

| | |
|--|---|
| | <ul style="list-style-type: none"> • Company Information and References • Provide references and contact information for at least three (3) institutions currently using the proposed technology. |
| | <p>Proposals must be received no later than 2:00PM EST November 28, 2017. Please mail one original and three copies of the proposal to:</p> |
| | <p>Attn: John Budron Director of Procurement and Contracts 100 State Street Framingham, MA 01701</p> |
| | <p>Proposals received after this deadline will not be considered.</p> |
| | <p>An electronic copy of your Technical Proposal is required in the form of a disk or flash drive. A separate disk or flash drive is required with your Pricing Proposal.</p> |
| <p>11 Proposal Evaluation Process</p> | |
| | <p>All proposals will be reviewed in accordance with the general evaluation criteria listed below. Proposals which have been determined not to be in compliance with the RFP requirements will not be considered. Pricing will only be considered on those proposals that are deemed acceptable. The contract will be awarded to the vendor(s) whose proposal is most responsive to needs of FSU and provides the highest value to FSU, considering cost as well as other factors based on the evaluation criteria described herein.</p> <p>All information gathered will become the property of FSU, and it will be kept on file in the Purchasing Department. The submission of this RFP does <i>not</i> constitute a contract between FSU and the Vendor.</p> |

12 Evaluation Criteria

A screening committee will review the proposals. The proposals will be evaluated and ranked in accordance with the evaluation criteria described in the table below.

Evaluation Criteria

| | |
|--|----|
| Ability to integrate with FSU Ellucian Banner to meet the desired specifications as requested in the RFP | 25 |
| Functionality, Feasibility and Sustainability of the solution | 25 |
| Implementation Time and Timeframe | 20 |
| Industry reputation and recognition | 15 |
| Cost of the overall solution, both one-time and on-going | 10 |
| Financial stability for continued and on-going support (if required) | 5 |

In addition to meeting the evaluation criteria, finalists may be asked to provide demonstrations of previous projects. Should a demonstration be required, respondents will be required to provide a demonstration at no cost to the University.

FSU reserves the right to reject any or all proposals, at its sole discretion, and to make an award that best satisfies the overall needs and interests of the University. In addition, FSU reserves the right to waive any irregularity or informality within the proposal or procurement process. The decision of the University will be final.

In addition, the Vendor's previous record (*i.e.*, references), company history, sales representation, terms and conditions, and explanation of any variances noted shall also be considered.

FSU reserves the right to review any variances, waive informalities, alter the scope of the project, reject any/all proposals, or cancel this RFP.

At the request and option of FSU, Vendors may be required to make an oral (face-to-face) presentation or to provide written clarification. These presentations or written clarifications will provide an opportunity for the Vendors to clarify--but not modify--their proposals.

All Vendors are required to address all service components described under the "Scope of Work/Services" section of this RFP.

13 Negotiations and Best and Final Offer

Following the opening and evaluation of all proposals submitted, FSU reserves the right to negotiate:

- the technical services offered
- the terms and conditions and/or the price of the proposed good/service/project
- modifications to the application
- training and support materials

Contract(s) may be negotiated with contractor(s) whose proposal is determined to be most responsive to FSU's needs and provides the highest value to FSU, considering cost as well as other factors based on the criteria described herein, all as solely determined by FSU.

14 Contract Award

- Any award made as a result of this Request for Proposal may be subject to the successful vendor and FSU entering into a signed written contract.
- Contract award(s) shall be made to the Vendor(s) whose proposal provides the highest value to FSU as solely determined by FSU.
- FSU may award a contract based on initial proposals received without discussion of such proposals; therefore, each initial proposal should be submitted with the most favorable price, terms, product, and service available. FSU reserves the right to be the sole judge as to the overall acceptability of any proposal or individual merits of specific provisions within competing offers.
- FSU reserves the right to reject any or all proposals and to award contract in whole or in part if deemed in the best interests of FSU.
- The Purchasing Office of FSU is the only agency authorized to award a contract for the proposed purchases.
- We look forward to receiving your proposal and appreciate your time and interest.

14.1 Notes:

- Forms in Appendix must be completed, signed and the originals submitted with the proposal.
- Incomplete or inaccurate proposals may be deemed nonresponsive and eliminated from consideration.
- Vendors are hereby advised that the State Universities are bound by open records laws when it receives proposal responses.

- All costs of the response preparation and submission shall be borne by the Vendor. The University shall, under no circumstance, be responsible for any pre-contractual expenses.
- Original proposals must be signed by a person duly authorized to execute the contract on behalf of the Vendor.

- One original and three copies of the proposal must be received at the stated address no later than **2:00 p.m. on November 28, 2017**, at which time they will be opened and reviewed. It is the Vendor's responsibility to insure that delivery to the department is made on time. *Late proposals will not be considered.*

- Proposals and pricing **must be submitted in separate sealed enveloped clearly marked #FSU-RFP-18-04 Technical Proposal or FSU-RFP-18-04 Pricing Proposal**. If any pricing appears in the Technical Proposal envelope, the response shall be disqualified.
- The award of this contract shall be between the vendor and Framingham State University. Other Massachusetts State Institutions have the option to utilize this competitively bid contract. Framingham State University shall have no responsibility for other State Institutions agreement/s or payment/s.

As required by the Commonwealth of Massachusetts, please complete and submit with the proposal the following documents.

The REQUIRED online forms can be found at:

- <http://www.mass.gov/osc/docs/forms/contracts/standard-contract-frm.pdf>
- <http://www.mass.gov/anf/docs/osd/forms/contracts/w-9.doc>
- <http://www.mass.gov/osc/docs/forms/contracts/comm-termsconditions.pdf>
- <http://www.mass.gov/osc/docs/forms/contracts/casl-form.pdf>
- <http://www.mass.gov/anf/docs/osd/sdo/sdp/sdp-form-for-pos-2014.xlsx>
- <http://www.mass.gov/anf/docs/osd/sdo/sdp/sdp-plan-form-1-commitment.docx>
- <http://www.mass.gov/anf/docs/osd/sdo/sdp/sdp-rplan-form-2-declaration.docx>
- <http://www.mass.gov/anf/docs/osd/sdo/sdp/sdp-rplan-form-3-reporting.xlsx>
- <http://www.mass.gov/anf/docs/osd/forms/busreffm.doc>
- <http://www.mass.gov/osc/docs/forms/accounts-payable/prompt-pay-frm.pdf>