

RFP #: RFP763-21-146465-TL

SUBMITTAL DUE DATE: December 15, 2020, 2:00 pm, local time

TITLE: CAP Student Success Platform

DATE: December 4, 2020

Addendum #2

Please note the following clarifications are hereby made to the aforementioned RFP.

Update/Change

This addendum is being issued to update/change answers submitted for questions #10, #32, #34 and #35 submitted in Addendum #1.

Questions and Answers

Question 1: Does UNTS have an existing middleware platform to support the required integrations (if desired)?

BOOMI is available but custom solutions can be developed as needed.

Question 2: Number of Users expected on the platform, Student Headcount, Faculty, Administrators.

2400 students, 0 faculty, 30 staff

Question 3: Does UNT require embedded AI or pull insights towards any reporting required?

Not required, PowerBI accessibility preferred.

Question 4: Does UNT use PeopleSoft for SIS? If not who is the SIS provider, if yes what version?

UNT System uses PeopleSoft for SIS.

Question 5: Integrations - are the 3 integrations (Peoplesoft, Outlook, Canvas) only integrations needed? How many systems does SSO need to validate?

Yes, those are the 3 integrations. Concurrent SSO preferred.

Question 6: Does UNT require electronic ticketing (internal or external) as part of the initial intake process?

Not to our knowledge.

Question 7: Would students need to have a full campus directory available as part of appt scheduling on this platform?

No, only for those staff using the system.

Question 8: Can UNTS please confirm if the purchase of the CAP Student Success Platform would be for each institution in UNTS (Denton, Dallas, and Health Science Center) or just the Health Science Center?

This product will support only the Health Science Center

Question 9: Can UNTS share who will be on the evaluation committee for this RFP?

We cannot disclose that information at this time.

Question 10: Can UNTS please provide a weighted evaluation scoring rubric?

*There will not be a **weighted** rubric for the evaluation. The responses will be evaluated based on the criteria's list in section 2.3.*

Question 11: Can UNTS please provide the decision timeline for this RFP?

Planning to have decision by the middle of January.

Question 12: Has UNTS identified a budget for this initiative, and if so, is it possible to share? Is there a price above which proposals would not be accepted?

We cannot disclose that information at this time.

Question 13: Can UNTS please describe the types of events they are looking to track in the system as noted in Attachment A?

Events would include presentations, large tutoring events, or other events where we want to track attendance.

Question 14: Can UNTS clarify what is being requested in the 'Quality of Proposal' section?

Does the proposal have all the required information? Is the information provided in an orderly manner? Does the proposal address requirements from Attachment A? If requirements cannot be met, is alternative information or solutions proposed?

Question 15: What strategic challenges is UNTS looking to address through this RFP?

Replacing an existing platform that would allow a continuity of services.

Question 16: Are there specific goals UNTS is looking to achieve? And in what time period?

Our goal is to replace an existing platform, provide a continuity of services, and enhance current platform. Implementation would take place by June 1, 2021.

Question 17: What are some challenges unique to UNTS that you think proposing vendors should be aware of as they compose their responses?

One challenge is multiple semesters running simultaneously. Another is to recognize that we are a graduate/professional institution so our needs are different than an undergrad institution. And lastly, that we have approximately 160 tutors that need to create notes on student appointments without accessing other information.

Question 18: Has funding been identified?

Yes.

Question 19: Describe how UNTS measures success. What metrics is UNTS looking to impact with this partnership?

We measure success by setting goals to reach our expectation. At this time a metric has not been determined.

Question 20: Can UNTS clarify the specific need being addressed by "Manage two terms at one time (either separately or integrate the terms)?" What does UNTS hope to achieve in this regard?

Our institution currently runs two different terms concurrently. The platform functioning should not be dependent on the current term or it must allow for two concurrent terms.

Question 21: Can you please specify what is meant by "Unlimited students and staff use"?

Being able to add users at any time. Students should be able to schedule multiple appointments for various reasons. Staff may need to be added due to expansions or possibly adding additional departments use.

Question 22: Due to COVID-19, our firm has restricted access to our local office and employees are required to work remotely for the time being. Additionally, employees have been instructed not to enter post offices/delivery service buildings if at all possible. With this in mind, will UNTS accept responses electronically, via email, secure/password protected Box link, or another acceptable electronic mode?

Responses must be received via FedEx, UPS or USPS

Question 23: We did not see a Pricing and Delivery Schedule included in the response. Can you please provide a copy?

Please refer to section 5.3 of the solicitation for pricing details.

Question 24: When does the University anticipate to begin project implementation?

Immediately after contracts and purchases are complete.

Question 25: When does the University anticipate to go live with the new student success platform?

Anticipated live date is June 1, 2021.

Question 26: Can you please provide the titles of the members of the proposal evaluation team?

That information cannot be provided at this time.

Question 27: What is the University's current student success platform?

GradesFirst.

Question 28: What functional/operational issues with the current student success platform is the University seeking to improve with a new system?

Current platform is no longer being improved and updated.

Question 29: What departments will be utilizing the new student success platform?

Various departments within the Division of Student & Academic Affairs.

Question 30: Will the new student success platform only be utilized at the UNT main campus, or will this system be used by UNT Dallas, UNTHSC, or other campuses/entities?

It will only be used at the UNTHSC campus.

Question 31: Is there a phasing plan for the project to cover different departments and aspects of the solution? If so, can this please be shared?

The plan is that all current users/departments as well as additional departments would all go live at the same time. There is no plan at this time to phase in other departments at a later time.

Question 32: Will the University be holding demonstrations from shortlisted vendors prior to vendor selection?

Yes, if needed.

Question 33: How many prospective suppliers will be invited to provide demonstrations for this project?

Unknown at this time.

Question 34: How will the University score/rank submitted proposals?

Please refer to section 2.3

Question 35: Has a scoring matrix for responses been created? If so, please share. If not, please identify when this will be established and how it will be distributed to bidders.

Please refer to section 2.3. If you would like to see how your response was evaluated, you can request a debriefing after you have been notified that the project has been awarded.

Question 36: For scoring, is there a preference for existing vendors currently working with UNT?

No.

Question 37: Is there any preference for systems that integrate with existing campus systems?

This will be considered under ease of integration.

Question 38: Has a budget been allocated and approved for this project?

We cannot disclose that information at this time.

Question 39: Which University department is funding this project?

We cannot disclose that information at this time.

Question 40: What is the University's budget for the project?

We cannot disclose that information at this time.

Question 41: Given the current COVID-19 situation, is funding secured for the project, or is there the possibility of funding being reprioritized to other initiatives?

Yes, funding is secured.

Question 42: What impact does the University anticipate on vendor/solution selection and/or implementation given the COVID-19 situation?

None.

Question 43: How is the University currently integrating between the student success platform and the SIS?

Flat file transfer.

Question 44: Are there any other systems the University intends to integrate with the student success platform?

PeopleSoft, Canvas, and Outlook.

Question 45: What University staff have been/will be assigned to the project for implementation?

We cannot disclose that information at this time.

Question 46: What is the University's annual student enrollment? Please breakdown by departments that would be utilizing the solution.

Enrollment averages between 2300 to 2400. All departments using the solution would serve all students.

Question 47: How many users will be admins/power users who may need full system access and/or mass communication access (e.g. emails to more than 200 students at a time)?

Approximately 15-20.

Question 48: How many users will be basic/end users, advisors, and faculty who do not need system configuration or mass communication access?

Approximately 160 peer tutors. Possibly another 20 advisors. 0 faculty.

Question 49: Is there a preference/requirement for solutions that offer unlimited email sending without per-contact/message costs?

Unlimited email sending is required.

Question 50: Has the University seen demos of any potential student success platform solutions or related technologies in the last 12 months? If so, which ones?

We cannot disclose that information at this time.

Question 51: Has the University worked or consulted with any vendors and/or external sources in the development of the requirements for this RFP? If so, please identify.

We cannot disclose that information at this time.

Question 52: Will UNT consider a two week extension to the Submittal Deadline or consider electronic RFP submissions?

No.

Question 53: What is the implementation timeline for the scope defined in this RFP?

Please refer to section 5.2 of the solicitation

Question 54: Does UNT currently use a particular survey tool?

Though there are several in use, Qualtrics is the most widely used.

Question 55: Does UNT currently have an existing service or tool for sending SMS/Text messages?

Current service is under contract review.

Question 56: Does UNT have an integration platform in place to integrate with PeopleSoft and other campus systems? If so, what is the solution? If not, how are integrations currently implemented?

Boomi is available but other methods are available as well including custom development.

Question 57: Does UNT have a current solution in place to assist with Student Success?

Yes.

Question 58: How many tables and fields/table are you planning to integrate (e.g., program enrollments, course

enrollments, course offerings, terms, programs)

At this stage in the process that information cannot be disclosed.

Question 59: Do you have a preferred middleware tool that is used for integrations today or that you wish to use in the future?

Boomi is currently used as an integration platform but not required.

Question 60: Do you have any preferred tool for Outlook integration? E.g., have you considered SF's default email integration with Lightning for Outlook?

UNT System does not have a preferred tool for Outlook integration.

Question 61: Are course enrollments driven by Peoplesoft or Canvas?

Peoplesoft.

Question 62: Is data beyond term grades needed from Canvas?

Current grades if possible.

Question 63: How frequent does Canvas data need to exchange with SF?

Daily.

Question 64: How many departments with unique student success needs do you need to support?

Currently four with the potential to add more.

Question 65: Please describe your kiosk. Is this an on-campus one-stop shop with one kiosk? Are there multiple kiosks serving different departments?

Currently there are multiple kiosks serving different departments, but our preference is for one kiosk for all departments.

Question 66: Do you have an existing text service you are looking to integrate?

Current service is under contract review.

Question 67: Approximately how many surveys and how many questions per survey are you planning?

Will vary based on the need.

Question 68: How many appointment types do you need to support?

Current system supports unlimited appointment types. Prefer to have unlimited appointment types.

Question 69: Do you have an existing text service you are looking to integrate?

No.

Question 70: Please describe the needs of your course schedule? Is this sourced from PS or Canvas?

Would like to see the student's current schedule with days/times/instructor/course information reflected in product. This is sourced from PeopleSoft.

Question 71: Do you have a preferred appointment tool? Salesforce Advisor Link leverages RIVA as a preferred Outlook calendar integration tool - have you considered RIVA or other similar tools?

UNT System does not have a preferred appointment tool.

Question 72: How many reports do you need to support for MVP? Please provide a description of major reports

Must have ability to pull reports on all activities with the ability to create custom reports.

Question 73: Please describe tutors' course availability

Tutors would be able to identify what courses they are available to tutor.

Question 74: Would you expect daily group emails to exceed 5000 emails per day?

No

Question 75: Do you have any preferred 3rd-party email tools?

Outlook is UNT System email tool.

Question 76: Can you help us understand the breakdown of number of users in each group that will be affected by this implementation?

Students *2300-2400*

Staff/Advisors - how many departments? *Approximately 20 advisors/4 departments*

Full time advisors *Approximately 2 advisors*

Part time advisors *If tutors are considered part-time limited advisors then approximately 160*

Faculty advisors *0*

Question 77: How do you plan on training and communicating with user groups affected by the implementation?

Training for staff will be done in small groups or one-on-one training. Training for tutors will be in small groups and guide sheets. Training for students will be done using guide sheets through email and on the websites.

-End of Addendum-

Tawana Laster

Issued by Tawana Laster

December 4, 2020

ACKNOWLEDGEMENT: Please acknowledge receipt of this addendum by initialing the appropriate line on the Addenda Checklist, Section 4 of the RFP.