ADDENDUM NUMBER 1
JANUARY 21, 2022
TO
SPECIFICATIONS TO REQUEST FOR PROPOSALS #22073
FOR
DEGREE PLANNING SOLUTION
DATED DECEMBER 23, 2021

The above-entitled specifications are hereby modified as follows and except as set forth herein otherwise remain unchanged and in full force and effect.

RETURN DATE EXTENSION

The due date for return of proposals is hereby extended to Thursday, February 3, 2022 at 2:00 p.m. CST.

PROPOSAL SUBMISSION MODIFICATION

Due to continuing shipping delays and uncertainties, proposals will be accepted via email at reedhr@umsystem.edu by no later than the return date and time specified above.

CLARIFICATION QUESTIONS

1. Will you accept electronic-only submissions in lieu of printed hard copies accompanied by USB flash drive, as currently stated in the document? Current widespread shipping delays make on-time delivery a concern. We anticipate needing to send our response as much as a week in advance of the deadline which will greatly reduce the window in which respondents can revise based on answers to questions. We appreciate your consideration to adapt accordingly.
   Response: We will accept electronic submissions sent to reedhr@umsystem.edu and received no later than the date and time specified in this addendum.

2. Can we submit our official HECVAT document for review or in place of the related aspects of ITSRQ Attachment C?
   Response: Yes an official HECVAT will be accepted in lieu of the ITSRQ.

3. The RFP states there are 73,000 students as part of the University of Missouri system. In terms of pricing, approximately what number of student users should be considered? For example, the breakdown of undergrad/grad students approximate user totals. Should we assume all students will have access?
   Response: The only campus currently interested in this solution is the MU campus. The total number of MU students (including UGRD, GRAD, & PROF) based on the FS2021 MU census is 31,412.

4. Does the University anticipate/prefer having one shared instance used for all system campuses or a separate instance per campus?
   Response: As of right now, this is only an MU project.
5. Is there an anticipated onboarding period designated for the project or any particulars related to timeline that we should factor in regarding our approach and response to the roadmap question?
   Response: MU campus leadership is interested in effective solutions that are able to be efficiently implemented with some quick wins early on during implementation.

6. Can vendors provide responses to Exhibit A (Vendor Questionnaire) in a Word/PDF format for ease of including screenshots, etc.? If yes, we acknowledge that we will maintain the integrity of the original file in full. If yes, can we confirm this section of our response does not count against the page limit?
   Response: We would prefer the response be in Excel format for the sake of consistency among all proposals.

7. Could you please confirm whether or not a performance bond is required as the inclusion of such a provision would be atypical toward the nature of the services?
   Response: A performance bond is not required.

8. Do legal documents and required forms from Mizzou count against the page limit?
   Response: No they do not.

9. Regarding Exhibit A’s Questions 7.09/7.10 in Exhibit A – they appear to overlap.
   Response: This is a formatting error. Please ignore 7.10.

10. Regarding Exhibit A’s Question 5.10, can Mizzou clarify this functionality or provide a use case? How does the University envision this type of capability?
    Response: We currently have the ability to hide courses in the degree audit, that are marked in PeopleSoft as “Do Not Publish” (e.g., placeholders, courses used for administrative processing, etc.), excluding them from student view. We would need to have the same functionality in the proposed solution.

11. Regarding Exhibit A’s Question 5.15, can Mizzou define “audit planned courses?”
    Response: In our current degree audit system, students and advisors can add planned courses to account for courses to be taken in future semesters, or courses they plan to transfer in. The proposed solution must be able to read and utilize these audit planned courses.

12. Regarding Exhibit A’s Question 5.17, can Mizzou define “temporary/date-ranged grades/grading scales?”
    Response: Grading scales in effect during short periods of time only. e.g., temporary S/U grading scale applicable (to otherwise regularly graded courses) only during the outbreak of the COVID pandemic.

13. Regarding Exhibit A’s Question 5.18, can Mizzou clarify what is being requested here? What sort of SIS data is this referring to?
    Response: The proposed solution must allow the ability to display different general education requirements based on information stored inside PeopleSoft (e.g., catalog year, academic unit, program of study (program/plan/subplan), etc.)

14. Regarding Exhibit A’s Question 5.33, can Mizzou clarify what is being requested here? Does this refer to product updates/platform versions?
    Response: The request is for the ability to effective-date degree audit templates so that they are applicable to only certain students, based on the student’s catalog year. And, for the modular
components of each audit (requirement, subrequirements, etc.) to also be effective-dated, so they are only incorporated into/utilized by degree audit templates with effective dates that encompass those of the requirements, etc. When we refer to version, we are referencing different historical effective-dated rows.

15. Regarding Exhibit A’s Question 5.42, can Mizzou define “stipulating courses?”
Response: To indicate which courses are acceptable/not acceptable towards meeting a degree audit/plan requirement/subrequirement/etc. For example, a student may select PHYSCS 1000, but not PHYSCS 1500.

16. Regarding Exhibit A’s Question 7.03, can Mizzou clarify what “lock” means in this instance? Can you provide an example?
Response: In our current platform, students are able to receive multiple schedule options. They are then able to “lock” or “add” one of the courses to their schedule and then re-run the remaining courses to see how they would fit into their schedule. We would want the proposed solution to allow the same functionality.

17. We are extremely cautious in sharing information that contains our security safe measures for data. Would Mizzou accept this information via a secured box link? If not, is Mizzou willing to sign an NDA prior to the RFP submission deadline so that we may provide this information in a protected manner?
Response: The University is willing to sign an NDA prior to RFP closing.

18. Can Mizzou please provide the decision timeline for this RFP?
Response: Proposals will be reviewed once the RFP closes for adherence to the mandatory requirements and then evaluated based on the responses provided to the Vendor Questionnaire. Once finalista(s) are identified, demonstrations will be arranged for the evaluation team and awards initiated after that. Ideally, the University would like to have an award decision made by the end of March at the latest.

19. Can you please provide a weighted scoring criteria that will be used to evaluate this RFP?
Response: The University does not share the scoring criteria prior to award of the RFP.

20. Regarding question 5.37 - Does the solution provide a log of changes to encoding?
   • Is the log you refer to changes to Degree Planner setup, such as sequencing, or changes end-users make?
Response: Changes to the degree audit/plan setup. e.g., if a degree audit applicable for the 2021-2022 academic year erroneously required PHYSCS 1000, and it was corrected to required PHYSCS 1100, the log should reflect information concerning the change (when, who, why, etc.).

21. Regarding questions 7.09 and 7.10 Schedule Planner tab on Exhibit A:
   • Should these be separate questions? Currently merged
Response: This is a formatting error. Please ignore 7.10.

22. Regarding question 9.03 - What options are available to set data retention policies as it pertains to encoding, audit reports, discrete data, etc?
   • Can you provide a few specific examples of what you are looking to accomplish?
   • Response: re degree audit encoding: The current policy is to maintain degree audits for 10 years, after which, they are archived in situ (within the application, but inaccessible to users; can be reactivated); how would the solution allow for this or similar retention policy implementation.
re audit reports: All degree audit reports are currently archived in a data warehouse; how would the solution allow for managing that data, implement retention policies, etc.

re discrete data: All data underlying all degree audit reports is currently archived in a data warehouse, allowing for querying/reporting; how would the solution support this functionality (both storage and querying/reporting).

23. Regarding question 10.1.7. Does the solution display detailed course information?
   • What detailed course information would you like provided?
   Response: We would need the current solution to be able to display things such as the following: course code (subject and number), credits, course title and long title, course description, grading basis, course component(s), course attribute(s), etc.

24. Regarding question 10.1.9. Does the solution provide a reporting tool for ad-hoc and canned reports?
   • What type of reports are you looking for? Please provide a few must-haves.
   Response: Direct access to query any and all data in the proposed solution including: underlying set-up tables, student-specific data, user-activity data, system-generated data. The proposed solution should have delivered reports and user-created specialized reports. Currently this is accomplished via ODBC (Microsoft Access), SQL (Toad), and Cognos reports.

25. Regarding question 10.2.15. Does the solution have a way for the institution to know when a student is off-plan?
   • What kind of off-plan scenarios would you like the Degree Planner to account for?
   Response: The student is outside of the parameters that would ensure degree completion by the expected graduation date, associated students’ cohort, etc., due to lack of required courses, remaining course availability, insufficient course load, insufficient GPA, selecting planned courses that do not fulfill requirements, etc.

26. Regarding question 10.3.21. Does the solution support sharing of encoded components and course lists when developing degree audit solutions?
   • Who would you want to share these with? Would these resources have access to setup in the system or not?
   Response: This pertains to modular development of components to be reutilized across degree audits/plan templates (if any) when creating the degree audit reports or plan templates (if any), e.g., does the solution support the creation of a component to check for completion of General Education requirements that can be reutilized by degree audit reports for sundry degrees across multiple catalog years (vis-à-vis creating the component anew for each degree audit report)?

27. What challenges and/or pain points are you experiencing with your existing Degree Audit system?
   Response: The degree audit system was initially developed to support advising needs. The solution should also support direct student utilization well (non-advisor-mediated information consumption).

28. What challenges and/or pain points are you experiencing with your existing Schedule Planner?
   Response: We do not have any pain points with our existing Scheduler Planner.

29. On a scale of 1 - 10 (1 being not important, 10 being very important), how important is automatic sequencing (requirements automatically populated in optimum terms) in a Degree Planner solution?
   Response: 10
30. On a scale of 1 - 10 (1 being not important, 10 being very important), how important is a real-time system to your institution?
   Response: 10

31. Why is program matching needed at the degree adult level if it is required at the degree planning level?
   Response: The degree audit level allows for “shotgun” approach via batch runs to identify possible degree paths based on completed coursework for large population of students. At the plan level, it would allow for potential identification of degree outcomes based on a student’s set of planned courses. The creation of a plan is not required and we may only have the audit to use.

32. What is the current likelihood that you will keep your current degree audit and scheduling tools?
   Response: We are unable to answer this question prior to assessing the RFP responses.

33. When does the University want to go live with the solution?
   Response: MU campus leadership is interested in effective solutions that are able to be efficiently implemented with some quick wins early on during implementation.

34. By “degree audit templates,” do you mean the way degree programs are represented in the solution?
   Response: Yes

35. On Tab 2, 2.02: What specific type(s) of integration is desired with Starfish?
   Response: Bi-directional student data exchange possibly including information on areas such as: off-track/on-track status, timely progress towards degree, information about flags/kudos raised in Starfish, etc.

36. On Tab 6, 6.02: Can you provide an example or rephrase this question? Are you asking about how the solution handles transfer equivalencies?
   Response: The level of otherwise equivalent external and internal courses do not always match; one might be at the freshman level and the other at the sophomore level, for example. The solution must allow for transfer courses to apply to requirements based on both the internal and external course level, as needed/required by the academic unit/program of study/etc.

37. On Tab 6, 6.54: What do you mean by “course code”?
   Response: The identifying subject/number combination for a course, say PHYSCS 1140, which may have changed over time.

38. On Tab 7: Is there a question missing for 7.10? The cell for the Question appears to be merged with the cell above in 7.9.
   Response: This is a formatting error. Please ignore 7.10.

39. Section 6. Instructions for Proposal Response (page 15 of RFP document): Does the 25-page limit include or exclude the forms and attachments at the end of the RFP (Request for Proposal Form, Attachment A, and Attachment B) as well as Attachment C- ITSRQ (spreadsheet)?
   Response: The 25 page limit does not include any forms included in the RFP document and required to be returned including Attachments A, B, and C.

40. Does the institution desire to keep the fully integrated scheduling and registration capability your students currently enjoy?
   Response: Yes
41. In 10.2.7. Does the solution handle multiple grading scales? What do you mean by grading scales?
   Does this mean variable sets of credits?
   Response: There are different grading scales for different academic units/programs. Some are numerically defined (65-100 scale for the School of Law), some are letter-based (A-F, S/U), etc.

42. For 10.2.10. Does the solution allow for requirement/subrequirement satisfaction by a variety of events (e.g., milestones, exams, etc.)? Are these requirements mapped in the Audit? Does displaying the information meet this requirement?
   Response: Merely displaying the information does not meet this requirement. The source of the information would typically (but not exclusively) be an external system (PeopleSoft, StarFish, etc.). The solution should provide a mechanism to allow for the external data to be conveyed to the degree audit/plan and for the degree audit/plan to accept such information as satisfying requirements/subrequirements/courses/etc., as needed/appropriate.

43. For 10.2.11. Does the solution allow for versioning/effective dating of components? Can you specify what components need to be versioned? Does this refer to peoplesoft's built in effective dating functionality?
   Response: The request is for the ability to effective-date degree audit templates so that they are applicable to only certain students, based on the student’s catalog year. And, for the modular components of each audit (requirement, subrequirements, etc.) to also be effective-dated, so they are only incorporated into/utilized by degree audit templates with effective dates that encompass those of the requirements, etc. When we refer to version, we are referencing different historical effective-dated rows.

44. For 10.2.15. Does the solution have a way for the institution to know when a student is off-plan? Is this intended to be based on the plan the student/advisor has created or based off of the official audit?
   Response: The student is outside of the parameters that would ensure degree completion by the expected graduation date, associated students’ cohort, etc., due to lack of required courses, remaining course availability, insufficient course load, insufficient GPA, selecting planned courses that do not fulfill requirements, etc. For the second part of the question, both.

45. Does uAchieve offer the option to run bulk audit reports across all or groups of students?
   Response: Yes

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