REQUEST FOR PROPOSAL  
RFP 16-131  

FOR  
University Scheduling System  

ISSUED BY: 
Procurement and Risk Management Services  
203 West O Street  
Young Building  
Russellville, AR 72801  

ISSUE DATE:  
July 18, 2016  

PROPOSAL OPENING DATE & TIME:  
August 19, 2016  
2:00 P.M.  

PROPOSALS WILL BE ACCEPTED UNTIL THE TIME AND DATE SPECIFIED. THE ENVELOPE MUST BE SEALED AND PROPERLY MARKED WITH THE RFP NUMBER, DATE AND HOUR OF PROPOSAL OPENING, PROPOSER’S NAME, AND RETURN ADDRESS.
Arkansas Tech University is requesting sealed proposals for a Scheduling System. The contract term will be for one year upon contract award, with an option to renew on an annual basis for a maximum of six (6) additional terms.

Point of Contact:
The University’s Procurement Director shall be the SOLE point of contact. Address any questions or requests for information to:

Jessica Holloway, APO
Procurement Director
Arkansas Tech University
Young Building East End
203 West O Street
Russellville, AR 72801-2222

Tel: 479-968-0269
Fax: 479-968-0633
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SCOPE OF SERVICES REQUESTED

Background

Founded in 1909, Arkansas Tech University is rich in history and is now one of the fastest growing universities in the state. Tech is a great university in a great location. Arkansas Tech University, a state-supported institution of higher education, is dedicated to nurturing scholastic development, integrity, and professionalism. The University offers a wide range of traditional and innovative programs which provide a solid educational foundation for life-long learning to a diverse community of learners. Arkansas Tech has over 400 faculty members, 3rd largest institution in Arkansas and had 12,054 for fall enrollment.

Tech has determined the need to implement a comprehensive calendar, academic and event scheduling system comprising both the operational and logistical activities around scheduling courses and facilities.

ATU-OIS provides a common central technology infrastructure which provides enterprise level systems to the university including the Banner Student System. The scheduling system must be compatible and integrate with the Banner environment The scheduling application should be compatible and accessible, if appropriate, via the Luminis Portal, Self Service Banner (SSB), Degree Works, and other enterprise systems.

Specifically, Tech is seeking an experienced and trusted vendor to provide the following:
Classroom Utilization and Optimization Software that includes a master calendar and event scheduling services.

Vendors who respond to this RFP MUST clearly explain and document the Banner integration process both at the college level and the system level, including the database integration. Scalability is critical in our environment. The documentation must include the processing timeline and schedule update cycle as at certain times of the year, such as the beginning of Fall and Spring semesters, our Banner system is very busy and the Scheduling software cannot adversely impact system performance. Preference is for a web-based hosted solution.

Tech is currently on Banner8 but Banner XE will be implemented in the near future.

Current versions:

Banner Student – currently at 8.9.1
Banner General – currently at 8.8.1
Degree Works – currently at 4.1.4
ODS – currently ODS 8.4.1
Oracle – 11.2.0.4  
AIX – 7.1  
Exchange - 2010 SP3 Rollup 4  
Linux - Redhat 4.9, 5.10, 6.4

Statement of Work  
*Describe how your solution will meet and/or exceed the requirements, addressing each of the following areas:*

**Scheduling – General Requirements**

1. System provides strong role-based security to limit views/update access to the room level, with ability to decentralize where necessary to allow for administrators with different roles to have different access levels to the system, e.g. some may read only, others may change, approve requests, release rooms, access to only certain buildings or even specific rooms etc.; System recognizes internal vs. external to INSTITUTION users. Internal and external have different rights, views, etc.
2. Comprehensive scheduling system that serves to schedule multiple spaces in multiple campus sites for events and academic classes.
3. Users can search for a room on campus that best fits their needs, including building, number of seats, room amenities, etc.
4. System allows users (individuals seeking to reserve space) to place requests online pending confirmation.
5. System allows for multiple administrators who have access to approve only those events occurring in their area of responsibility

6. Identify room/space characteristics:
   - Capacity
   - Equipment
   - Accessibility
   - Maps/floor plan
   - Furniture
   - Security (door locking system, building security)
   - Restriction type (user/department/etc.)
   - Room type (lab, fixed seating, tiered, etc.)
   - Room restrictions (i.e., cannot schedule dance class above other space when occupied)
   - Availability (hours, closures etc.)
   - Other strong communication system to provide appropriate email enabled notifications as required to ensure that campus Schedulers, Caterers, Facilities, Public Safety,

7. Technology Technicians and all other personnel involved in supporting campus events are informed of building space use and needs
8. Confirmation email is automatically sent upon approval of reservation
9. System does not allow double booking but does provide conflict resolution
10. Online Product Help
11. User-friendliness
   - Quick learning curve
   - Little to no training required for basic room reservations
   - Intuitive interface, easy data entry
   - Easy to understand user guides and instructions
   - Interface with existing systems such as Degree Works, Exchange, ODS, Banner
   - Fast Performance
   - Strong reporting capability (canned reports and customizable)

12. Ability to change/update/cancel room reservations/assignments as needed. Describe how change notifications are handled.
13. Ability to identify special needs (contracts, fees, media equipment, catering, room use agreements etc.)
14. Integrate charges for facilities into scheduling process
15. Ability to review proposed results before assigning spaces.
16. Ability to conduct “what if” planning scenarios for example in the event that scheduling changes are needed due to a building/floor/area being taken offline.

Calendar Requirements
1. System generates an automatic comprehensive college calendar, showing events occurring in various venues, available on the public web site.
2. Requesters can opt in or out of including their event on the public web site calendar
3. Provide multiple calendar views by day, week, month, year
4. Drag /Drop functionality in web pages
5. Can add images to the event on the calendar.
6. System allows approval before event is published to the master calendar.
7. System has calendar API’s

Academic Scheduling Requirements
1. Ability to assign and track course preferences for example:
   - Capacity
   - Equipment
   - Room type (lab, fixed seating, tiered, etc.)
   - Furniture
   - Audio visual and other classroom technology
   - Other
2. Match Faculty or Department room requests to available rooms meeting those needs including technology equipment, special seating arrangements, maps/ charts etc.
3. Ability to assign rooms to classes in batch process following import of academic schedule from SIS.
4. Entire Academic room schedule view is available online to all non schedulers
5. Ability to schedule cross-listed courses in same room
6. Ability to override restrictions
7. Ability to roll (copy) course preferences and requirements from term to term.
8. Software provides flexibility for different room scheduling for Final ExamWeek (within term, but different from regular class schedule)
9. Describe the capabilities of your software to perform analysis to determine the most effective combination of classroom space utilization and classroom assignment.

Events Scheduling Requirements
1. Catering orders can be placed through the system. Information such as catering menus and prices are available. Orders and automatic price quotations occur online. System has the ability to schedule catering orders. Requesters can update catering orders prior to the event date based on restrictions placed in the system by catering department administrators.
2. Able to identify different set-up and tear-down time for different rooms and venues.
3. Administrators are able to deny a request for space
4. Able to maintain separate inventory of equipment, including furniture and AV, for each area of administrator responsibility. As equipment is reserved, inventory notes number of remaining inventory available.
5. System automatically notifies support services such as facilities, campus safety, and HVAC maintenance personnel when appropriate event parameters are met. Describe how notification is accomplished.
6. Automatic alert of room reservation request is sent to building administrator responsible for approving requests
7. Automatic confirmation of reservation is sent to requester once reservation is approved.
8. Ability to track and include event notes such as contacts, discussions, calls, etc.
9. Allows for users to request a recurring event or event with multiple random dates.
10. Allow administrators to assign status levels such as “tentative.”
11. Allows users and/or administrators to identify user type such as “student group,” “administration,” “academic department,” etc.
12. Integrate with video display system to show daily building events.
13. Standard catering menus can be loaded in the system with pricing for administrators to select item, quantity, etc.
14. Allow set-up and tear-down time to change depending on type of event.
15. Users have a section to type special request, directions, etc.
16. Ability to clarify for requesters advance notice needed for different venues, e.g. meeting rooms may be available immediately while a ballroom requires set-up
17. Able to maintain a distributed inventory of equipment, furniture etc. These separate inventories are available for each building and may also be made available for another venue with approval from the appropriate administrator for that inventory.
18. Room Information for users can include pictures, set-up diagrams, set-up possibilities, occupancy, room policies, etc. as appropriate
19. Building administrator can quickly view the status of building room usage on any given day
20. Users are able to easily find the name and contact number of the individual responsible for the reservation of each space

**Technical Requirements**

1. Prebuilt two-way interface with Ellucian Banner
   - Describe how the interface works
   - Is it real time or batch?
   - What kind of changes can be sent from the scheduling software back to SIS and vice versa.
   - Provide specifications for all the fields that are sent in each direction
   - Describe the method(s) used for data transfer
   - Audio & Video Reservation system integration (for example, Crestron, MXP, AMX, Magic Info)
     - List the A/V reservation systems with which you integrate.
   - Integration with Exchange (Rooms are in the Outlook Calendar)
   - Describe how products integrates with Banner-environment
2. Product is 100% web-based
3. All scheduling functions should work via a web interface. Describe the client software used in your product and list all plugins, web technologies, etc. necessary for full functionality (e.g. HTML5, Flash, Java, ActiveX) Specify the minimum versions of these plugins if applicable.
4. Describe API’s available for custom integration.
5. Describe LDAP and/or Active Directory Authentication. List any other means of external authentication (CAS, etc.) and specify which SAML versions are supported
6. Describe Portal integration delivered or available via RSS feeds, XML feeds, Sharepoint Technology, Luminis IV & V or other Portal environment. Tech is currently on Luminis IV, will be moving to Luminis V soon.
7. Describe the programming interface technologies supported by the scheduling/calendar system.
8. List all supported server Operating System Platforms. Provide specific versions.
9. List all supported Database Platforms. Provide specific versions. Oracle 11g, 12c, and MSSQL 2005 should be supported. Discuss plan for migration to Oracle
11. Describe Hosted offerings (Cloud-based)
12. Does your Scheduling or Analytics software integrate with another vendor’s Scheduling or Analytics software? If so, please indicate which vendor and products and describe the integration.
Reports Requirements
1. Ad Hoc Reporting Tool is provided with the system and customized reports can be generated easily.
2. Describe what report writing tools are provided? Is integration with Evisions Argos reporting tool available?
3. Describe Export formats available.
4. System automatically develops invoices as appropriate
5. A wide range of reports can be generated. Program includes standard reports such as activity information, catering orders, printed room signs which can be posted next to the door of each room, daily schedules, room usage statistics, contracts, client usage, repetitive activities, room usage by category, cancellations, daily & weekly activity, queued activities, requested activities, a/v use, food & beverage requests, inventory, personnel requirements, personnel assigned, room capacity, etc.
6. Management reports are standard and can be customized. Reports available include: AV Media usage, daily room utilization, food and beverage utilization, furnishing utilization, personnel utilization, prep/clean utilization, room not available, and summary room utilization.
7. Reports on Classroom Utilization
8. Web Viewable reports have printer friendly versions.

Performance Analytics - Requirements and General Questions
1. Describe what makes your product unique compared to competitive solutions?
2. Are the systems tools patented?
3. The system should provide tools that help institutions forecast student demand based on program requirements and degree audit data.
4. Predict students who will take classes in an upcoming term
5. Accurately derive demand on a student-by-student basis by comparing the progress of existing students (passed courses and transfer credits) to their declared program's required courses and their location preference
6. Use student-by-student progress and the pre and co-requisite rules within each program no matter what delivery format or location and the student prefer
7. Identify critical courses that must be offered to meet the needs of those students who require a particular course at a certain time i.e. MA600 must be offered to allow required amount of students to graduate this session/term
8. Scheduling of courses is flexible and not limited to terms – can start before or after a term or any time within a term
9. Ability to accommodate courses that span across terms
10. Determine the unique course needs of students for an upcoming term
11. Distinguish a course “need” from a “want” and a “need” from a “critical path need”
12. Account for students that are “correctly” following a prescriptive schedule each term and those that have failed a course, gone part-time, transferred in a courses, etc.
13. Account for credit-hour loads per student per term. Is this configurable? Can different student groups have different default credit hour loads?
14. Intelligently generate or assist institutions in refining course offerings (sections) based on student course need
15. Identify the subpopulation of active students who are likely to take classes in an upcoming term
16. Handle new/transfer students who are likely to take classes in an upcoming term
17. Estimate course load for various student populations
18. Aggregate course demand based on student progress and degree rules (including complex pre-reqs, attributes, substitutions, waivers and complex rules)

Reporting/Dashboards
1. Provide reports to show courses that could be eliminated based on low enrollment
2. Provide reports to show courses that could be added based on trend demand
3. Analytics Dashboards that provide the results of Analysis runs that can be viewed and filtered by top-n/bottom-n findings, academic colleges and academic departments to manage and share planning data.
4. Analytics and utilization reporting. Please describe the type of reporting that is available out of the box. Please describe the type of reports that must be developed by the customer and describe the process for development of those reports.

**Integration with other Ellucian Applications**
1. **ODS:** Does your product integrate with Ellucian’s ODS (Operational Data Store). If so, how does the integration work and how is the data made available in the ODS?
2. **Degree Works Integration:** Does your product integrate with Ellucian’s Degree Works? If so, how does the integration work and how is the data made available in Degree Works.

**Classroom Utilization Assessment and Planning - Requirements and General Questions**
1. Vendor should provide Discovery of existing related goals and strategic plans and initiatives for each college
2. Vendor will collect historical schedule and enrollment data and facilities inventory from each institution for analysis purposes
3. Analyzes resource utilization in a historical schedule
4. Analyzes space capacity, highlighting existing bottlenecks and growth capacity
5. Compares historical course demand (last like term and like-term trend) to tentative offerings in an upcoming term to produce actionable metrics
6. Models opportunity, including assessing the strategic and monetary opportunities of:
7. Course offering strategies that could improve student course access (and completion velocity) while generating additional tuition revenue
8. Space management and course offering strategies that could improve the capacity of existing resources, defer construction cost and enable long-term tuition growth
9. Course offering refinement strategies that could improve course offering efficiency and reduce adjunct instructional costs
10. Findings delivered in Key Performance Indicator comparative dashboards highlighting scheduling effectiveness and course access
11. Presentations of initial benchmarking results presented onsite to college. Provide details as to how the following items are addressed.
   - Assessment of Opportunity and Impact
   - Impact on Student Success (time to completion)
   - Productive Credits, Credit Load, Velocity
   - Financial Impact and Opportunity
   - Capacity for enrollment growth and change
   - Sustainability and mitigation of building operating costs
   - Comparative Database and Dashboard Reporting

- **Vendor may describe any additional key components or functionality that may not have been listed previously**

**Questions:**
Any questions related to RFP must be received no later than **August 5, 2:00 p.m.**

**Notification:**
All respondents will be notified in writing of the company selected. All materials and documentation submitted to the University in response to this RFP shall belong to the University exclusively. Proprietary information shall not be subject to public disclosure.
**Grounds for Rejection of Proposals:**
Proposals that are substantially incomplete of lack key information WILL be rejected. Any proprietary information must be clearly indicated. The classification of the entire document or line item prices as “proprietary” is not acceptable and WILL result in rejection of proposal.

ATU reserves the right to accept or reject any or all proposals.

Late proposals will not be accepted and will be returned to the sender.

Failure of selected contractor to complete the EEO Policy Letter and Contract & Grant Disclosure will be rejected.

Failure of authorized representative to sign the proposal in ink will be rejected.

**Award:**
Award will be made in the best interest of the University; and the University’s decision is final. The University reserves the right to negotiate with the firm selected for the best and final offer.

**Successful Contractor’s Requirements:**
Agree that any agreements entered into as a result of this RFP will be governed by the laws of the State or Arkansas.

Resultant contracts/agreement shall not be construed to waive the Sovereign Immunity of the State of Arkansas or Arkansas Tech University.

All disputes regarding resultant contract/agreement shall be submitted to the Arkansas Claims Commission for adjudication in accordance with A.C.A. 19-10-201 et seq.

Agree to comply with all statutory and regulatory provisions governing the Federal Student Aid (FSA) programs and agree to be liable for any violation of these provisions.

Company shall not discriminate against any person based on race, religion, color, national origin, sex, age, disability, genetic information or veteran’s status during the term of this contract.

**Assignment:**
Any resultant contract shall not be assigned without express written consent of the University. It is the intent of the University that the contractor and persons under their direct supervision perform all services.

**Cancellation:**
The University reserves the right to cancel any resultant contract, in part or in whole, without penalty upon 30 days written notice to the contractor. Reasons for cancellation shall include but not be limited to:
- Failure to perform to expectations (defined by ATU)
- Failure to respond to requests for service in a timely manner (defined by ATU)
- ATU’s decision not to exercise renewal option

**Funding Out Clause:**
Following is the Arkansas Office of State Procurement’s policy for multiple year contracts:

In the event that the anticipated term of this contract extends beyond the current biennial period (7-01-07 thru 6-30-09), the contract will be terminable on the part of the University without cause at the end of the current biennial period. However, the University may agree to continue the contract, but in no case will any renewal, automatic or otherwise, cause the
contract to continue beyond a biennial period for which the contract is renewed. Any services or products on contract accepted by the University must be paid but does not obligate the University to continue the contract beyond the end of a biennial period.”

**Arkansas Technology Access Clause:**
When procuring a technology product or when soliciting the development of such a product, the State of Arkansas is required to comply with the provisions of Arkansas Code Annotated § 25-26-201 et seq., as amended by Act 308 of 2013, which expresses the policy of the State to provide individuals who are blind or visually impaired with access to information technology purchased in whole or in part with state funds. The Vendor expressly acknowledges and agrees that state funds may not be expended in connection with the purchase of information technology unless that system meets the statutory requirements found in 36 C.F.R. § 1194.21, as it existed on January 1, 2013 (software applications and operating systems) and 36 C.F.R. § 1194.22, as it existed on January 1, 2013 (web-based intranet and internet information and applications), in accordance with the State of Arkansas technology policy standards relating to accessibility by persons with visual impairments.

**ACCORDINGLY, THE VENDOR EXPRESSLY REPRESENTS AND WARRANTS** to the State of Arkansas through the procurement process by submission of a Voluntary Product Accessibility Template (VPAT) for 36 C.F.R. § 1194.21, as it existed on January 1, 2013 (software applications and operating systems) and 36 C.F.R. § 1194.22, as it existed on January 1, 2013 (web-based intranet and internet information and applications) that the technology provided to the State for purchase is capable, either by virtue of features included within the technology, or because it is readily adaptable by use with other technology, of:

- Providing, to the extent required by Arkansas Code Annotated § 25-26-201 et seq., as amended by Act 308 of 2013, equivalent access for effective use by both visual and non-visual means;
- Presenting information, including prompts used for interactive communications, in formats intended for nonvisual use;
- After being made accessible, integrating into networks for obtaining, retrieving, and disseminating information used by individuals who are not blind or visually impaired;
- Providing effective, interactive control and use of the technology, including without limitation the operating system, software applications, and format of the data presented is readily achievable by nonvisual means;
- Being compatible with information technology used by other individuals with whom the blind or visually impaired individuals interact;
- Integrating into networks used to share communications among employees, program participants, and the public; and
- Providing the capability of equivalent access by nonvisual means to telecommunications or other interconnected network services used by persons who are not blind or visually impaired.

State agencies cannot claim a product as a whole is not commercially available because no product in the marketplace meets all the standards. Agencies must evaluate products to determine which product best meets the standards. If an agency purchases a product that does not best meet the standards, the agency must provide written documentation supporting the selection of a different product.

For purposes of this section, the phrase “equivalent access” means a substantially similar ability to communicate with, or make use of, the technology, either directly, by features incorporated within the technology, or by other reasonable means such as assistive devices or services which would constitute reasonable accommodations under the Americans with Disabilities Act or similar state and federal laws. Examples of methods by which equivalent access may be provided include, but are not limited to, keyboard alternatives to mouse commands or other means of navigating graphical displays, and customizable display appearance. As provided in Arkansas Code Annotated § 25-26-201 et seq., as amended by Act 308 of 2013, if equivalent access is not reasonably available, then individuals who are blind or visually impaired shall be provided a reasonable accommodation as defined in 42 U.S.C. § 12111(9), as it existed on January 1, 2013.
If the information manipulated or presented by the product is inherently visual in nature, so that its meaning cannot be conveyed non-Visually, these specifications do not prohibit the purchase or use of an information technology product that does not meet these standards.

**Evaluation of Proposals:**
The following are general factors to be used to evaluate each proposal and determine which proposal will be awarded the contract. They are not necessarily listed in order of importance.

- A. Adequacy and completeness of the proposal with regard to the information specified, i.e., compliance with terms, conditions, and other provisions contained in the RFP.
- B. Technical Component and Integration into existing systems and ability to provide required specifications
- C. Likelihood that proposed methodology will accomplish expected outcomes;
- D. Ability of the firm to perform successfully under the terms and conditions of this bid and the ensuing contract
- E. Cost Component - Cost and Reoccurring Cost to the University
- F. Compliance with ADA and other Federal, State and University Statues, Regulations and or Polices
- G. Ease of implementation and continued maintenance of the platform to include customization.
- H. The integrity, past performance, and technical resources of the firm; and
- I. Staff availability and their experience.
- J. Demonstrated experience, particularly in the firm’s familiarity with a project of this scope as generally outlined in the RFP

An evaluation team will judge the merit of proposals received in accordance with the general criteria. Individual team members will first score proposals on the areas specified in RFP Scope of Work Sections on a scale from 1-5 with 5 being the highest rating and 1 being the lowest rating. While a numerical rating system may be used to assist the evaluation committee in making the award decision, the award decision ultimately is a business judgment that will reflect an integrated assessment of the relative merits of the proposals using the factors set forth below:

- Scheduling Requirements
- Calendar Requirements
- Academic Scheduling Requirements
- Events Scheduling Requirements
- Technical Requirements
- Reports Requirements
- Performance Analytics Requirements (although scored it may not be used in the final decision)
- Reporting/Dashboards
- Integration with other Ellucian Applications
- Classroom Utilization Assessment and Planning Requirements
- Vendor Added Key Components or Functionality
- Ease of Use

References when conducted will not be scored but will be considered on a “pass/fail” basis.

Following an individual scoring period, the evaluation team will meet to discuss initial scoring and may choose to either make an award at that time or to select vendors for a round of demonstrations/presentations. Another round of discussion and scoring follows the vendor presentations.

It is the intention of the University to evaluate proposals thereby rendering a business decision most advantageous to the University. The recommendations of this committee will be forwarded to the Director of Procurement for approval and execution. Failure of the Bidder to provide any information requested in this RFP may result in disqualification of the proposal. The sole objective of the evaluation committee and the Director of Procurement will be to recommend the
Bidder whose proposal is the most responsive to Arkansas Tech University’s needs while staying within available monetary resources.

If requested, respondent must be willing to provide a demonstration of system being offered. A demonstration via the Internet will be acceptable.

**IN A SEPARATE SEALED ENVELOPE**, provide a fee schedule including:
- Any start-up fees
- Monthly service fee
- Purchase price for software
- Annual Maintenance
- Fee for technology integration
- Cost of value added services

Provide a list of not less than three (3) references currently using vendor’s service. The list is to include the name of the person most familiar with the service and a telephone number and the number of years service has been provided.

**Proposal Submission:**
Vendors interested in submitting proposals must submit all documentation by 2:00 p.m. CDT, Friday, August 19, 2016. Send one (1) original, (1) electronic copy (flashdrive), and three (3) copies to:

Jessica Holloway  
Arkansas Tech University  
Young Building East End  
203 West O Street  
Russellville, AR 72801-2222

Mark outside of envelope with “RFP 16-131”

ALL Respondents will be **required** to complete the following forms:

- Contract and Grant Disclosure and Certification Form
- EEO Policy Letter
- Illegal Immigrant Certification Form

Forms are available on our web site. **www.atu.edu/purchasing**