



PURCHASING – BIDS AND CONTRACTS

REQUEST FOR PROPOSAL

For

Learning Management System
RFP Number 2011P136

ISSUE DATE: June 20, 2011

PROPOSAL DUE DATE / TIME: July 11, 2011 @ 3:00PM CST

IMPORTANT NOTICE

IF YOU ARE NOT RESPONDING: 1. CHECK THE BOX FOR “NO RESPONSE”, 2. ADD THE REASON FOR YOUR NON- RESPONSE, 3. SIGN, DATE, AND FAX BACK THIS COVER PAGE ONLY, TO 405-974-3838

1. ☐ NO RESPONSE

2. COMPANY NAME: _____

3. OUR REASON FOR “NO RESPONSE”:

If the full Request for Proposal is not included, you can pull the entire document at:

<http://www.uco.edu/administration/pur-pay-trav/current-solicitations/index.asp>

DIRECT ALL QUESTIONS & INQUIRES TO:

Primary Contact

Denise L. Smith

Director, Purchasing & Payment Services

E-Mail: dsmith111@uco.edu

Department Fax: 405-974-3838

Secondary Contact

Britni Brannon

Buyer II

E-Mail: bbrannon@uco.edu

No phone calls shall be accepted during the solicitation posting. Email or Fax communications are the only acceptable forms of communication and must be posed during the designated and acceptable time frame according to the RFP directive.

1.0 The University of Central Oklahoma (UCO)

1.1 About the University

If you are not familiar with UCO, you can find information about our University at the University's website www.uco.edu.

1.2 UCO – A Green Campus promoting Sustainability

The University of Central Oklahoma supports Green Purchasing, upholding the philosophy of a Green Campus by assessing the environmental impacts of incoming commodities and outgoing waste. We encourage proposals to include economical and environmentally friendly products and service options which serve to minimize waste, reduce excess packaging, recycle, reduce, reuse, prevent pollution and/or offer resource efficiency. It is our goal to maximize environmental responsibility on the UCO Campus.

1.3 Campus Map

A UCO Campus Map can be located on the University's website per the following link:
<http://www.uco.edu/resources/maps.asp>

2.0 General Information and Instructions to Proposers

2.1 Original RFP Document

The UCO Purchasing & Payment Services Department shall retain the Request for Proposal (RFP), and all related terms and conditions, exhibits and other attachments, in original form in an archival copy. Any modification of these, in the vendor's submission, is grounds for immediate disqualification.

2.2 Specific Proposal Instructions, Organization, Preparation, Submission & Opening

The UCO Purchasing Affidavit (Attachment A), Vendor Qualification/Financial Resource Statement (Attachment B) and Certificate of Compliance with Executive Order 11246 (Attachment C), all attached herewith, are required portions of the submitted proposal. Other attachments, per RFP, may also be required portions of submitted proposals.

2.3 Schedule of Events

The following is a tentative schedule applicable to this RFP. UCO reserves the right to make changes in accordance with the University's needs.

Action	Date
Issue RFP	06/20/11
Pre-Proposal Conference and/or Site Visit	N/A
Last day for Vendor to submit written questions	06/30/11
Tentative Addendum Post Date	07/05/11
RFP Closing Date and Time	07/11/11, 3 PM CST
Evaluation Period	07/12/11 – 07/22/11
Vendor Presentations	07/29/11
<u>Tentative</u> Notice of Award	08/05/11
Implementation	08/11

All Proposers are notified of the award. Also, the award will be posted at:

<http://www.uco.edu/administration/pur-pay-trav/info-for-vendors/index.asp>

Select [CLICK HERE](#) to Review Current UCO Contracts and Recent Awards

We are unable to offer responses to inquiries about the solicitation after the award. Proposing Vendors can seek the following link to the UCO Legal Counsel website/Open Records/Fax Transmittal & Request for Public Record Form for any additional information sought after the award. Thank you for supporting our compliance with statute and policy.

<http://www.uco.edu/administration/legal/doc-form-legal/index.asp>

2.4 Pre-Proposal Conference – N/A

If a pre-proposal conference has not been scheduled, UCO reserves the right to schedule a pre-proposal conference at a later date PRIOR to the due date of the Proposal if, in the sole judgment of UCO, there is a need for such conference.

2.5 Pre-Proposal Site Visit - N/A

A site visit is required if the project is such that the vendor must have actual knowledge of the physical situation relative to the solicitation in order to submit a valid response.

2.6 Accommodations for People with Disabilities

If the vendor, or any of the vendor's employees, participating in this RFP needs or has questions about the University's accommodations for people with disabilities please contact the UCO Purchasing Office by telephone 405-974-2490, to make the necessary arrangements. Requests should be made as early as possible to allow time to arrange the accommodations.

2.7 Performance Bond, Insurance or Similar Requirement

Vendors should read this document and UCO Standard Terms and Conditions closely to determine whether a performance bond or similar requirements are indicated for this RFP. If so, vendors should ensure that complete and competent evidence of such coverage is provided to the University in their proposal package. The Bond and insurance are required to be in effect and cover 100% of the project until accepted in total by UCO.

2.8 Originals/Copies - Submission Deadline and Location

The PROPOSAL and all attachments, to also include any applicable & acknowledged addenda, are to be included within the required submission which includes one (1) original signature printed hard copy, marked "ORIGINAL" along with nineteen (19) electronic media copies in PDF format on CD or DVD. The signer of the PROPOSAL for the vendor must be a legally authorized representative capable of binding, through contract, the vendor and vendor's organization. The original proposal, all attachments and all required copies may be bundled in one sealed package. Any confidential or proprietary information must be sealed in a separate envelope within the submission envelope/package and clearly marked as CONFIDENTIAL/PROPRIETARY. ***Facsimile and/or Email Proposals will NOT be accepted.*** All Proposals must be submitted and received by the University **NO LATER THAN 3:00PM CST, Monday, July 11, 2011.**

Proposals must be addressed as follows with the "University of Central Oklahoma Request for Proposal # 2011P136, Learning Management System" **clearly marked on the outside of the sealed package** to:

University of Central Oklahoma
Attention: Britni Brannon, Buyer II
Bid Proposal Enclosed (2011P136 Learning Management System)
Lillard Administration Bldg., Room 109
100 North University Drive
Edmond, OK 73034

Office hours for receipt of proposals are: Monday through Friday, 9 A.M. through 5 P.M., Central Standard Time. Offers may be hand delivered, express mailed, or otherwise sent to arrive prior to the closing time set for receipt of offers, as determined by the clock in the UCO Purchasing & Payment Services office.

2.9 Communication, Questions, Inquires

From the date of RFP issue, to the submission closing date, the vendor must not make available or discuss any part of their proposal with any employee or agent of the University, unless prior permission is requested in writing by the vendor and granted in writing, from the Director of Purchasing or designee. The sole contact between the University and vendor for questions, inquires, clarifications or interpretations related to the terms and conditions, process, procedures, language, and/or specifications of the RFP is the Director of Purchasing or designee. For communication purposes all questions and inquires regarding this document will be directed in writing to the attention of:

Primary Contact: Denise L. Smith, Director
Purchasing & Payment Services
Email: dsmith111@uco.edu
Department Fax: (405) 974-3838

Secondary Contact: Britni Brannon, Buyer II
Purchasing & Payment Services
E-mail: bbrannon@uco.edu

Questions and/or information requests may be submitted as they occur, but NOT LATER THAN **1:00 PM CST, Thursday, June 30, 2011.** Email questions, referencing ***“Questions for RFP# 2011P136” on the correspondence.*** Questions and answers will be posted to the website as one addendum to the solicitation.

3.0 Terms and Conditions Governing the Resulting Contract

3.1 UCO Standard Terms & Conditions

Standard Terms & Conditions are available at the following link: <http://www.uco.edu/administration/pay-trav/info-for-vendors/index.asp>. Select document noted as UCO Standard Terms and Conditions. By submitting a quotation, proposal or bid, the supplier or vendor is agreeing to adopt the UCO Standard Terms and Conditions as the Terms and Conditions applicable to this transaction.

3.2 The Resulting Contract

The resulting contract shall consist of (1) UCO solicitation (whether RFQ, RFP or ITB) and any changes, (2) Negotiations rendered to writing and signed by both parties, (3) Vendors qualifying Response/Quote/Proposal/Bid, and (4) UCO Terms & Conditions. This will also be the priority order by which any conflict in the contract shall be resolved.

3.3 Sexual and Verbal Harassment

The policies of the University, along with sections of Federal and State Laws, prohibit sexual and verbal harassment of any University employees, students, faculty or guests. Sexual harassment includes any unwelcome sexual advance, any request for sexual favor or any other verbal or physical conduct of sexual nature that is so pervasive as to create a hostile or offensive work environment or offensive academic environment. Verbal harassment includes, but is not limited to, the use of profanity, loud or boisterous remarks, inappropriate speech, inappropriate suggestive conduct or body movements or comments that could be interpreted by the hearer as being derogatory in nature. This type of behavior and conduct is not tolerated or condoned on the campus of the University of Central Oklahoma. Vendors and contractors are required to exercise control over their employees, agents and subcontractors so as to prohibit acts of sexual and verbal harassment and agree as a term and condition that such vendor, contractor, agents, employees or subcontractors may be immediately removed from the project site and from University premises.

3.4 Specific and Unique Terms and Conditions applicable to this RFP

The following Terms and Conditions, along with the UCO Standard Terms and Conditions, incorporated by reference, will become part of any Agreement resulting from this RFP between the University and the vendor.

- A. This RFP does not contain bond requirements.
- B. This is a firm, fixed-price RFP. Please state all costs clearly and completely. UCO will not accept any hidden costs or costs not disclosed in response to this RFP.
- C. Responses must be received in the required format. Failure to respond in the correct format will result in immediate disqualification.
- D. RFP Response: In order to be considered for selection, vendors must submit a complete response to this RFP. The proposal shall be submitted in both print and electronic media as follows: One (1) printed original and nineteen (19) electronic media copies in a PDF format on CD or DVD media.
- E. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP, sub-letter, and repeat the text of the requirement as it appears in the RFP. Information that does not fall within any of the RFP requirements, such as any license agreement, of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if evaluators are unable to find where the RFP requirements are specifically addressed. Description of features, functionality or services must indicate whether it is included in the base cost or at an additional charge.
- F. The top rated vendors shall be required to give an oral presentation of their proposal to UCO. The date for oral presentations will be July 29, 2011. Notification of the top three will be provided on July 25, 2011. It is strongly recommended that vendors make their presentations in person and on-campus. If necessary, oral presentation may be made via web conference. The vendor shall be responsible for all travel arrangements and associated costs as well as providing the connection to the live web conference.

3.5 HB 1804, Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

Pursuant to 25 O.S. 1313, effective 7/1/08, all individuals, contractors, subcontractors or vendors are prohibited by State Law from entering into a contract with a public employer for the performance of services within the State of Oklahoma unless registered and participating in the Status Verification System to verify information of all new employees.

The Status Verification Service System is defined in 25 O.S. 1312 and includes, but is not limited to, the free Employment Verification Program (EEV) available at: www.dhs.gov/E-Verify

By accepting a purchase order from the University of Central Oklahoma or executing a contract on part of the vendor with the University, the individual, contractor or vendor warrants and attests that they are registered and participating in the Status Verification System. Vendor declares its employees and all proposed subcontractors are in compliance with the Federal Immigration and Nationality Act (FINA) and all other Federal and State laws and regulations related to the immigration status of employees. These warranties shall remain in effect through the entire term, including all renewed periods if applicable, of the contract. The University reserves the right to request copies of documents certifying compliance with this requirement.

3.6 UCO Transportation and Parking

Effective August 18, 2008, contractors and vendors parking on the UCO Campus will be required to purchase UCO parking passes in the student and faculty/staff lots. Please see the Transportation and Parking Services website for contractor and vendor parking rates and regulations:

<http://www.uco.edu/administration/safety-transportation/transportation-parking-services/index.asp>

3.7 Information Technology for Individuals with Disabilities – Section 508 Federal Law

Pursuant to Title 74, Section 85.7d and OAC 580:15-6-21 electronic and information technology acquisitions, agreements and contracts shall comply with applicable Oklahoma Information Technology Accessibility Standards issued by the Oklahoma Office of State Finance.

3.8 Tobacco-Free Campus

Effective 7/1/2010, UCO is a tobacco-free campus. The University appreciates compliance.

4.0 Evaluation Criteria**4.1 Proposal Evaluation**

Proposals will be evaluated by a committee designated by the UCO Purchasing Department. Evaluation criteria for this RFP will be as follows:

- A. Company Background, Third Party Vendors, Strategic Partnerships – 10%
- B. Features & Rating – 40%
- C. Written Response – 45%
- D. Pricing – 5%

5.0 Specifications**5.1 Requirement Overview:**

The University of Central Oklahoma requires a web-based Learning Management solution that provides functionality for online virtual learning spaces, information dissemination, course management, display and distribution of electronic materials and student activities and evaluation. The solution must meet current University standards for accessibility and security. The solution must also integrate with University standard programs and applications, or provide a viable alternative.

5.2 Vision of the selected UCO Learning Management Solution.

We are looking for the following characteristics of an LMS:

- A. Engaging solution for active learners in a virtual environment available anytime, anywhere, through any computer and/or mobile device.
- B. Elegant (aesthetically pleasing, clean and simple design)
- C. Easy to Use (intuitive design, efficient to manage, quick to create, edit and/or achieve tasks)
- D. Seamless (smart tools interoperate, data flow is smooth, similar actions and consistent interface to achieve tasks, aware of variety of document formats, easy data interchange/exchange)
- E. Reliable and Robust (stable, high quality assurance, high uptime, fault tolerant, easy backup strategies, simple disaster recovery)
- F. Real-time, seamless and transparent integration with Banner 8.x SIS, UCONNECT portal (currently Luminis IV) and integration with ExLibris Voyager and other library systems.

- G. Extendable and Interoperable (API calls, Services Oriented Architecture, web services, 3rd party tools)
- H. Scalable (continues to perform without degradation of performance when increasing users, adding courses, expanding servers, etc.)
- I. Assessable (reporting summaries allowing measurement of usage and growth)
- J. Accessible and Secure (meeting UCO's requirements for section 508 compliance, Information Security and Technology and Network Usage policies.)

5.3 Company Background and Higher Education Experience

Proposing vendors shall have more than 3 years of experience in delivering enterprise-level, campus-wide solutions to Master II higher education institutions with a student headcount of 17,000 or more and an active online course environment. Vendor shall have more than 20 higher education clients. A number of these higher education clients shall be SunGard Banner clients, as large as UCO.

- A. Provide your company's ownership, history, number of years in business, size, an indication of its financial health, and strategic partners.
- B. Identify the parent corporation and any subsidiaries.
- C. Describe your major learning management systems, and related products and services.
- D. Employees (#of FTE in R&D, Software Development, Support, Sales Marketing, Training, Helpdesk Support, Administrative/Other). Provide organizational charts.
- E. Respondent must include references from the five largest companies/educational institutions for which the learning management system has been implemented. At least three should be similar in scope to the University of Central Oklahoma and SunGard Banner clients. Include the date(s) of implementation, the client name, address and the name and phone number of the individual UCO has your permission to contact.
- F. Describe the details of the LMS implementation of one of your major clients similar in scope to the University of Central Oklahoma.
 - i. Describe the institutional implementation of your LMS including the number of active courses and students supported by this implementation. Projects referred to should include the customer's name, address, telephone number of the responsible official who may be contacted, and the software licensed and operation date. The hardware environment of each of the client references should also be provided.
 - ii. Provide an analysis of the biggest obstacle(s) encountered in a large-scale implementation and how it/they were handled.
- G. The respondent will also provide additional information:
 - i. Detail client retention rates for the past three years.
 - ii. Describe the type of customer support typically provided during installation.
 - iii. Describe the type of customer support typically provided after installation.

5.4 Third Party Vendors

- A. What is your plan for working with third party vendors?
- B. Who are you currently working with? On what projects?
- C. Provide three references from vendors. Discussion projects, length of relationship, what is in production, and what is in development.

5.5 Strategic Partnerships

Does the respondent have strategic partnerships or alliances with other technology or educational entities? If so, how might these benefit the University of Central Oklahoma?

5.6 Sample License Agreement

Although the University of Central Oklahoma contract with the terms and conditions required by the State of Oklahoma is required, respondent must include for UCO reference, a sample copy of a typical license agreement and service level agreement used to formalize the respondent's legal relationship with an institution of higher education or other public entity. Variances between this sample and conditions required by UCO do not constitute notification that the respondent is taking exception to a term or condition. Respondent must clearly list any exceptions taken in the submitted proposal. UCO reserves the right to reject a proposal on these grounds.

5.7 Proof of FERPA Compliance

Provide a statement of compliance to FERPA legislation (or any other legislation that requires confidentiality (e.g. HIPAA) that ensures the ability to limit the release of information for FERPA purposes.

5.8 Features

Description of features, functionality or services must indicate whether it is included in the base cost or at an additional charge.

Please rate the status of the following features using the rating below.

3- Provided in the Base Package

2- Provided with stipulations (Be Specific)

1- To be provided in a future release (Provide release date)

0- Not provided or not supported

	Vendor Rating	Comments
Course Management		
1. Section Management		
a. By Term		
b. By College		
c. By Department		
d. By Program		
e. By Role (Instructional Designer, Support Staff)		
f. "True" Student View (Instructor is able to access and interact with the class in the same way as a student.)		
2. Instructors are able to update multiple sections from one interface (ex. Two or more sections of the same class, or undergraduate/graduate sections)		

3. Create interactive learning objects, modules, or units for users with different learning styles, and for different presentation methods.		
a. Integrates with SoftChalk latest version lesson creation tool		
b. Integrates with eInstruction CPS response system?		
4. SCORM		
a. Import SCORM compliant objects		
b. Supports SCORM 1.2 and higher		
c. SCORM Modules may be graded		
d. SCORM Information tracked and reported to the instructor		
e. Interaction level tracking of SCORM Modules.		
5. File Management System		
a. HTML editor (or WYSIWYG capable editor)		
b. File Manager		
c. Multiple file uploading		
d. Drag and Drop Uploading		
6. Gradebook		
a. Export grades to SunGard Banner via integration (Final and Midterm Grades)		
b. Weighted categories (ex. Exams are worth 30%, Homework is worth 10%)		
c. Custom formulas (ex. Sum, Drop lowest, Average)		
d. Grading forms or Rubrics		
e. Rubrics are accessible for students to see criteria		
f. Grading forms / Rubrics are integrated with the LMS grade book features		
g. Grading forms / Rubrics are interactive (ex. Radio buttons for selecting criteria)		
h. Rubrics can be copied and shared between courses and instructors		
i. Student access to individual grades.		
7. Import publisher content		
a. eTextbooks		
b. Virtual Simulations		
c. Test Question Banks		

8. Online Assignments		
a. Student file upload		
b. Digital Markup and Instructor feedback to students		
9. Selective Release		
a. On performance, dates and other criteria.		
b. For preventing of file downloads, such as copyright or intellectual property.		
10. Online Assessments		
a. Multiple question types (T/F, Multiple Choice, Essay etc...)		
b. Import/Export quizzes or Testbanks.		
c. Does the solution integrate with Respondus 4.0 Campus Wide		
11. Peer review for Online Assignments.		
12. Plagiarism detection tool		
a. Full-featured integration with Turnitin.com (e.g. Gradebook, GradeMark, PeerMark)		
b. Other integrated plagiarism detection tool (Specify)		
Communication		
1. Calendar		
a. Export to external systems (iCal, Outlook, Other (specify))		
b. Import bulk entries		
c. Course specific and integrated view for student.		
d. Integration with other calendar applications (Google, Microsoft Live, Other (specify))		
2. Announcements		
3. "Push" Notifications		
a. Email		
b. Text		
c. Dashboard		
d. Facebook		
4. Email		
a. Send to external accounts		
b. Reply from external accounts		

5. Notifications for update to course content		
a. For the instructor (ex. Student submits assignment, completes chapter reading)		
b. For the student (ex. Instructor posts new lecture, uploads new chapter notes)		
6. Discussion forums		
a. Anonymous posting option		
b. Graded		
7. Chat		
a. Video Chat		
8. Voice Tools		
a. Live Audio		
b. Live Video		
c. Recorded Audio		
d. Recorded Video		
9. Web Conferencing		
a. Wimba integration		
b. Other web conferencing solution integration (specify)		
User features		
1. Student and Faculty profiles		
a. Biography		
b. Pictures		
2. ePortfolio		
3. Group activities		
a. Discussions		
b. Chat		
c. Content Areas		
Content		
1. Blogs		
a. Contained in the LMS system		
b. External blog may be integrated into the course site (ex. Wordpress)		
2. Wikis		
a. Contained in the LMS system		
b. External wiki may be integrated into the course site (ex. Confluence, PBwiki)		

3. Links to internal and external content (ex. Link to website, link to assessment from learning module)		
4. 4. Podcasts		
5. Support for RSS feeds		
6. Mobile Support		
a. Ipad/iPhone/iPod Touch		
b. Blackberry		
c. Android		
d. Mobile browser based		
e. Native "app" for access.		
7. Support for HTML5 and CSS3 web standards		
8. Allows for the creation of video and audio content from within the LMS (faculty or student)		
Student Assessment		
1. Student Activity Tracking		
2. Student Performance Tracking		
a. "Early Alert" Notifications for student performance		
3. End of term assessments		
4. Anonymous options for surveys		
5. Ability to align course and section goals with general education competencies, or course goals.		
6. Integration with positive student identity solutions (ex. Software Secure, Acxiom)		
End-User Help		
1. Documentation		
a. Contextual		
2. Training Materials		
3. Customizable by the University		
4. Online Video Tutorials		
5. Printed Materials		
Administration Tools		
1. Ability to easily create ad-hoc communities (ex.-student clubs, class study groups)		
2. Reporting		
a. Course Statistics		

b. Term Statistics		
c. Usage Statistics (ex – active users, active courses)		
d. System Usage Statistics (ex – peak times, average/high/low users)		
e. User Statistics (ex – active faculty, active students)		
f. Objective tracking		
g. Provides integrated analytic capabilities (e.g. course tool usage, time on task)		
3. Batch Activities		
a. Import/Export courses		
b. Import/Export users		
c. Batch enrollment via data extract		
d. Batch Delete course and users		
e. Manual entry of courses and users		
4. Custom login and branding		
a. Customizable user interface		
b. Customizable user interface at the course level.		
5. Crosslisting of courses (“Crosslisting” is a process for sharing course content without manually recreating multiple instances of the same course that has different enrollments. For reporting and grade extract purposes the original sections are used, and students are grouped accordingly. Example 1) One course has two names because a student can get credit for either social studies or multicultural studies. Hence the same content, with enrollments from BOTH classes are merged and all students are counted, for enrollment purposes, to be in the same course. Example 2) One faculty member teaches 2 sections of Health 101. The instructor wants all students in one course with the same content, but students from the different sections do not see each other in forums, etc.)		
6. Secure exam administration (via built in tool, or Respondus LockDown Browser)		
7. Ability to identify and remove user accounts that have been inactive for X number of months.		

8. Ability to identify and remove sections that have been inactive for X number of months.		
Support		
1. 24x7x365 Technical (Administrator) Support		
2. 24x7x365 Technical (End-user) support (Student, Faculty)		
3. Application supports Windows XP clients		
4. Application supports Windows Vista clients		
5. Application supports Windows 7 clients		
6. Application supports Mac OS X clients		
7. Application supports Linux clients		
8. Application supports Firefox 4.0 browser and earlier versions.		
9. Application supports Internet Explorer 9 browser and earlier versions		
10. Application supports Safari browser.		
11. Application supports Google Chrome browser.		
12. Vendor supports new OS versions within 90 days of release.		
13. Vendor supports new browser versions within 90 days of release.		
14. Vendor supports new version of integrated 3 rd party tools within 90 days of release.		
15. User interface is consistent across all supported desktop clients.		
16. User interface is consistent across all supported mobile clients.		
17. Dedicated contacts within the company for this account		
18. Follow-up protocol in place		
19. Online bug and support call tracking viewable by customer		
20. Tiered escalation path		
Implementation Assistance		
1. Migration Services		
2. Performance Tuning		
3. Professional Services		
4. Project Manager		

5. Regular (Weekly, Monthly, etc) Planning meetings		
Application Service Provider		
1. Hosting		
2. Disaster Recovery		
3. Recovery from Catastrophic Failure		
4. Recovery of a single course section		
5. Offsite backup		
6. Security		
7. Uptime Monitoring		
8. Virus scanning support for attachments/content		
Community		
1. Conferences		
2. User Groups		
3. Webinars		
4. Website/Forums		
Training		
1. Administrators		
2. Existing materials (video, tutorials) available		
3. Train-the-Trainer		
4. Documentation		

5.9 RFP – Written Response

Before beginning this section, please note the following response requirements or your response may be disqualified.

This section of the LMS RFP is seeking detailed responses to the following questions and topics for qualitative analysis. Provide a description for each item, rather than simply an affirmative/negative response. Description of features, functionality or services must indicate whether it is included in the base cost or at an additional charge.

Note: The numbering for this section begins at 1.0 for ease of reference in the response.

1 LMS Provider Business and Partnership

1.1 Relationships

- 1.1.1 Describe a typical customer relationship. Also provide a description of the relationship between key contacts within your organization. (e.g. “A Technical Support Representative will be the main customer contact if a technical issue arises. If the TSR is unable to resolve an issue within 24 hours, the Project Manager in the Customer Relations department is alerted to the issue and will contact the client.”)

1.2 Collaboration

- 1.2.1 UCO customers would like the ability to provide feedback for refining and improving business by actively participating and highlighting best practices of their products. What vehicles will you offer to UCO in order to shape the product, support and services provided by the LMS provider?
- 1.2.2 Describe your philosophy of an open and collaborative LMS provider. Give examples specific to other institutional partnerships you enjoy.
- 1.2.3 Describe events and user communities available and/or supported by the LMS provider in order to learn from other users and clients.

1.3 Other topics UCO should consider in this area of LMS Provider Business and Partnership?

2 System Architecture and Viability

2.1 Reliability and stability

2.1.1 Uptime

- 2.1.1.1 Provide uptime statistics of the LMS.
- 2.1.1.2 Provide uptime statistics of a hosted solution.
- 2.1.1.3 How do you calculate the uptime?

2.1.2 How resilient is the product to hardware and/or software failure?

2.1.3 Describe the levels of redundancy that can be integrated into the system’s architecture. (E.g. database replication, hardware, etc.)

2.1.4 Describe the single points of failure.

2.1.5 Describe routine hardware maintenance that can be performed without disrupting the system availability to users.

2.1.6 Outline the alerts or warnings that appear when the system is becoming overloaded.

2.1.7 Describe the mechanisms available to a system administrator to know the LMS performance is degrading.

2.2 Scalability

- 2.2.1 How is the system/product expandable and scalable?
- 2.2.2 As LMS use grows both in breadth and depth, is the system expandable such that the labor requirements and system uptime are not affected?
- 2.2.3 Attach system diagrams and a narrative describing a standard setup for level of campus usage as stated below.

Students: 17,000 – 30,000+

Faculty: 900-1500+

Courses: 2,000-5,500+

2.3 Sustainability

- 2.3.1 How many FTE (full-time equivalent) UCO staff members are needed to maintain the system/product based on campus size described in 2.2.3? Define for hosted vs. non-hosted environments. Be sure to include the skill sets that these staff members will need to run the system/product.

2.4 Extendibility - The LMS must be able to extend the features of the system via APIs (Application Program Interfaces) or some other customizations that follow a set of industry standards.

- 2.4.1 List the methods and/or tools available to extend the system. For example, can a web application be built that calls on the LMS to perform certain functions?
- 2.4.2 Describe how your product coordinates available web services in an end-to-end business process. Are other products needed?
- 2.4.3 List the functions that can be performed via a web API.
 - 2.4.3.1 Can user accounts be created and deleted via an API?
 - 2.4.3.2 Can enrollment adds and drops be performed via the API?
- 2.4.4 Describe the process for importing and/or exporting grades. Include the file formats used.
- 2.4.5 Describe your process for incorporating single sign-on from other campus systems (portals, legacy systems).
- 2.4.6 Describe the single sign-on process when incorporating extensions to the LMS. Will the users need to separately sign into that extension or are directory and account information passed from the LMS to the extension? Please list examples of items that do not require additional sign in.
- 2.4.7 List additional data that can be posted from the LMS to other systems (e.g. achievement of learning outcomes).
- 2.4.8 Describe additional functions that can be performed via a web API.

2.5 System Requirements

- 2.5.1 Describe the hardware needed to run the whole system in a production mode for the scenario outlined in section 2.2.3? (If this is a hosted solution, provide a pricing sheet as part of the proposal for hardware upgrades above and beyond the recommendations given here, e.g. extra RAM, hard drive, bandwidth, etc.)
- 2.5.2 Define technology requirements (both network and system) for the installation of your product, e.g. 100mb or gigabit VLAN infrastructure, LINUX REDHAT ES4, hardware 4-way CPU with 8 GB ram, etc.

- 2.5.3 Describe any additional hardware and software needed or recommended to complete implementing and managing the product. For hosted solutions, please provide pricing for the additional items as part of the proposal.
- 2.5.4 Describe both the minimum and recommended hardware, software and bandwidth setup for accessing the system off-campus (e.g a student accessing a class from home).
- 2.5.5 Describe any or all components of the proposed solution that can be run in a virtual environment.
- 2.5.6 Describe any scalability limitations of the database management system used.
- 2.5.7 Is your product certified to run on RAC or clustered databases? If yes, please describe.
- 2.5.8 List databases that are certified to run with the proposed solution.

2.6 Quality Control and Performance Testing

- 2.6.1 Describe the Quality Assurance processes the software is run through to ensure the least amount of bugs and issues are found in the product in a production environment.
- 2.6.2 Provide information regarding the QA department size, methodology, vision, commitment, and track record.
- 2.6.3 Describe the processes for testing hot fixes and new releases.
- 2.6.4 List performance tests that are done on the system BEFORE software is released.
- 2.6.5 Describe the testing environment performed in a simulated production environment with full-sized databases, user traffic and application architecture.
- 2.6.6 List the comprehensive functional tests that are performed. Describe the QA process checks for accessibility. (Section 508)
- 2.6.7 Describe the type of integration testing that is performed.
- 2.6.8 Describe the load testing process.
- 2.6.9 Are load tests by type of transaction performed? Describe the results (e.g. what happens when 1,000 students use the chat function simultaneously?)
- 2.6.10 By whom, if anyone, were load testing results independently verified?

2.7 Backup

- 2.7.1 Describe the methods for a full LMS backup.
- 2.7.2 Is the system configuration backed up?
- 2.7.3 What are the methods for course section backups?
- 2.7.4 Describe the methods for individual course section recovery and the amount of time required to perform the recovery. Can all sections be recovered from the course section backup?
- 2.7.5 Is it possible to complete nightly or weekly section backups for a production system with a few thousand course sections? Does this process require system downtime? (If the response would vary based on the hardware/software in use, provide information for each scenario.)
- 2.7.6 Define the Term roll over process. Can courses be archived/backed up by term? Can this be done without affecting end-user performance?
- 2.7.7 Describe the backup system configurations (hardware and software) that are used by other large institutions.

- 2.7.8 If the solution is hosted, what is the process for requesting and typical turnaround time to send a client part of the archive (e.g. how long would it take to provide the full Fall 2009 archive)?

2.8 Disaster Recovery

- 2.8.1 Describe the process a university would go through to perform LMS disaster recovery.
- 2.8.2 If you provide a hosted solution, describe your disaster recovery procedures.

2.9 Security

- 2.9.1 Describe the security philosophy and architecture for your LMS.
- 2.9.2 What security protocols or standards are available to secure data collected and secure transactions protecting transmission of information?
- 2.9.3 List the methods of authentication available. (e.g. LDAP, CAS, etc.) How many different authentication methods can be used on the same system for different groups or organizations?
- 2.9.4 Disclose any known security breaches of the proposed solution within the past two years and your response.

3 Standards for LMS Migration

The University of Central Oklahoma requires an LMS solution that can simplify the conversion of currently developed courses and online course templates in Blackboard Campus Edition 8.x. Course, faculty, and student data should not be held “captive” within the structure of the proposed solution or be costly or timely to extract. Address the following questions.

- 3.1 What migration tools and utilities are available to move from Blackboard Campus Edition 8.x to the proposed solution?
- 3.1.1 Provide the specific software products and version numbers that the tools and utilities work with. Indicate if tools are included in the product, an additional integrated component, or a 3rd party tool for purchase.
- 3.1.2 How reliable are these tools or utilities and do they work for all types of content in existing courses (i.e. course packs)? Provide specific examples of other institutions where these tools have been successfully used.
- 3.1.3 If the tools/utilities do not successfully import all content, where are the trouble spots? What issues are typical?
- 3.1.4 When content is migrated, describe the file formats which are utilized.
- 3.2 What migration tools and utilities are available to move from the respondent’s proposed solution to a standard format (e.g., IMS formats)?
- 3.2.1 How reliable and practical are the tools or utilities to export any and/or all data within the respondent’s proposed solution at any time?
- 3.2.2 Where are the known trouble spots?

- 3.3 Estimate the percentage of fully migrated courses given __#____; courses in BB WebCT, CE8, many of which include audio, video, doc, docx, xls, etc.
- 3.4 Estimate the amount of time the migration should run given UCO's environment.
- 3.5 Describe the migration "clean up" process and estimate the amount of time per course.
- 3.6 Describe tools, if any, that are available to pin point migrated elements.

4 Feature Set and Intuitive User Interface Design

- 4.1 A detailed list of features is provided in the Response Tables that preceded this narrative section. If there are additional features that were not included, please describe them here.
- 4.2 List the features that are unique to your product.
- 4.3 Intuitive interface
 - 4.3.1 Describe your user-interface design philosophy. In what ways is the interface designed to be intuitive?
 - 4.3.2 Provide your method of determining ease of use.
 - 4.3.3 Describe how these tools are designed for higher education's teaching and learning environment.
 - 4.3.4 Describe the LMS interface intuitiveness for faculty, students, and administrators.
 - 4.3.5 How can the ease of use of the LMS be tested by the respondent?
 - 4.3.6 Explain if and how your software supports Cascading Style Sheets.
 - 4.3.7 Provide examples of how your interface follows W3C web standards.
 - 4.3.8 Describe options available to end user for customization of the user interface (differentiate options for instructor vs. student)
 - 4.3.9 Describe instructional design tools/support integrated into the system. (e.g. wizards, best practices)
- 4.4 Mobile Technologies
 - 4.4.1 List the devices the proposed LMS supports.
 - 4.4.2 List the mobile platforms the LMS supports.
 - 4.4.3 List the mobile devices for which an interface is specifically designed.
 - 4.4.4 Describe the functionality included in the mobile application of the LMS. If developed differently for different devices or platforms, list separately.
 - 4.4.5 Describe the functionality that is currently under development and the release date for availability.
 - 4.4.6 Describe how your LMS supports delivery of multimedia and streaming video to mobile devices utilizing appropriate bandwidth and screen resolutions.
- 4.5 Foreign Languages
 - 4.5.1 List the languages available with this LMS.
 - 4.5.2 Outline the steps and permissions required to install languages and make them available to the users.
 - 4.5.3 List the steps required for a user to change languages.
 - 4.5.4 Describe the timeline for releasing languages. For example, are the languages released at the same time new releases are available?

4.6 File Upload

- 4.6.1 List any file types that cannot be uploaded/accessed in a course.
- 4.6.2 List methods supported for multiple and large file uploads (e.g. WebDAV, FTP)
- 4.6.3 Describe how uploaded files (documents, presentations, etc) appear in the LMS.(HTML, file attachment, window frame, or new window)
- 4.6.4 Define file size limits or quotas for the amount of content that can be uploaded to a course?
- 4.6.5 Describe file size limits configuration changes at a course and global level.

4.7 Web 2.0 Integration

- 4.7.1 List the Web 2.0 tools that have been developed in the LMS. (Example, course-level blogs)
- 4.7.2 List the Web 2.0 tools that are accessible in the LMS.
- 4.7.3 Describe your plan to integrate developing technologies without compromising the core requirements of the LMS.

4.8 Other topics the UCO should consider in this area of LMS Features and User Interface Design?

5 Library Resources Integration

It is important for the proposed solution to be able to effectively integrate a wide range of online library tools and services.

- 5.1 Does the proposed solution integrate with institution-based or system-based virtual reference services? If yes, name which ones and the protocol(s) by which they are accessed.
- 5.2 Are instructors able to integrate electronic reserves and online journal articles from within courses? If yes, which platforms are supported?
- 5.3 Does the proposed system integrate with the ExLibris Voyager library system? If yes, provide a list of some of the institutions you have worked with for this integration. In addition, does the proposed solution require a separate login to the library system or can this be integrated with the sign-on services of the product?
- 5.4 Does the proposed solution integrate with independent database sources? (e.g. LexisNexis, Gale, JSTOR)
- 5.5 Does the proposed solution integrate with library products that require proxy services to access them remotely? If so, how are proxy services managed (by library services staff or each end-user?)
- 5.6 Does the proposed solution allow for librarians to contribute additional materials to the course shell?
- 5.7 Does the proposed solution provide the ability to restrict copying, storage and further distribution of copyrighted materials in compliance with the TEACH act?

6 Accessibility

- 6.1 Do all users with or without disabilities have equally effective access, quality, timeliness, and availability to all functions and aspects of your product? Provide examples.
 - 6.1.1 Describe equal quality - if a person without disability has access to a text-based chat feature then the person with a disability has access to the same content in such a way that it is equally operable.
 - 6.1.2 Equal timeliness - if a person without a disability has 24 / 7 access then a person with a disability has 24 / 7 access.

- 6.1.3 Equal availability - if a person without disabilities can use the LMS with their operating system of choice then a person with disabilities can operate the LMS with their operating system of choice.
- 6.2 Explain how support materials (documentation, online help, video tutorials, etc) are accessible with equally effective access, quality, timeliness, and availability.
- 6.3 Explain how you ensure accessibility compliancy.
- 6.4 Describe your timeline for responding to timely updates to the product when accessibility issues arise.
- 6.5 Which tools, if any, are not accessible with equally effective access, quality, timeliness and availability? Is there a plan currently in place to make those items accessible with equally effective access, quality, timeliness, and availability? Provide the timeline.
- 6.6 List screen readers certified to work with your solution. Indicate any that are recommended.
- 6.7 Describe the process for ensuring accessibility of new releases in areas of equally effective access, quality, timeliness, and availability.
- 6.8 If your company has a web site addressing accessibility, please list the URL.
- 6.9 What tools are available for a disabled person to be able to use your website listed above in order to learn how to best navigate through your product with accessibility tools?

7 Administration

- 7.1 Describe the ease and flexibility of the application administration.
- 7.2 List User Roles that are available. Describe how each role is determined when integrated with SunGard Banner.
- 7.3 Define the roles (student, designer, administrator, etc) available in your LMS.
- 7.4 Provide the default permissions for each of those roles listed above.
- 7.5 Describe which roles are customizable and how each may be customized.
- 7.6 Describe how permissions and roles are assigned.
- 7.7 Describe how a large number of permission/role assignments are applied at once.
- 7.8 List the types of configuration and settings available in the application.
- 7.9 How does your product deal with cross-listing of course sections (two or more section enrollments merged into one "master" course section enrollment)?
- 7.10 Describe how a survey can be easily set up across all course sections or any subset of course sections at one time. Can the survey be submitted anonymously?
- 7.11 Branding
 - 7.11.1 Describe the extent to which the institution can brand their LMS.
 - 7.11.2 Describe where the vendor/product logo appears and whether it can be removed.
- 7.12 Banner/SIS integration
 - 7.12.1 Does the application support real time, seamless integration with the UCO SIS, Banner 8.x? Describe.
 - 7.12.2 Describe professional services, if any, that will be required for integration with Banner 8.x?
 - 7.12.3 Can the system process user records, course creation/deletion, and student enrollment information?

7.12.4 Is this a batch process, or in real-time processing?

7.13 Student Portal Integration

7.13.1 Currently, UCO is using the Portal Luminis IV, does the application support integration via single sign on (SSO) to courses?

7.13.2 Please provide a list of student portals your LMS has successfully been integrated with at other universities.

7.13.3 Does the application have the ability to use the student portal system as the authentication source for user accounts, if so, which technologies are supported? (ex. LDAP, Active Directory)

8 Support and Services

8.1 Support

8.1.1 Fully explain support options that are available.

8.1.1.1 Technical support

8.1.1.1 End-user support

8.1.2 List support options that are provided as a baseline with the software license.

8.1.3 Describe service levels available.

8.1.4 Describe how tiered support is accessed to resolve more complex issues.

8.1.5 Describe general implementation and troubleshooting support services available.

8.1.6 Describe premium support opportunities where the campus is assigned a technical person who knows the university's LMS environment before a support phone call comes in.

8.1.7 Explain customer-focused information such as a central knowledgebase and/or issue tracker available for customer use.

8.1.8 Please provide the following metrics from last year (12 months previous to now):

8.1.8.1 Average response and resolution time for urgent needs

8.1.8.2 Average response and resolution time for important, but not urgent needs

8.1.8.3 Average response and resolution time for other needs

8.1.8.4 Number of staff working on support/troubleshooting within the company

8.1.8.5 Number of institutions each technical staff person is supporting

8.1.8.6 Average age for a trouble ticket before it is resolved

8.1.8.7 Average number of tickets resolved in 24 hours

8.1.8.8 Number of incidents escalated above tier one support

8.1.8.9 Average response time and resolution for escalated versus routine issues

8.1.8.10 Other helpdesk metrics that can be provided? How are these determined?

8.2 Services

- 8.2.1 List general information services provided regarding technology, installation, implementation, backup and recovery of systems.
- 8.2.2 Define which of these services are provided with the software license.
- 8.2.3 Describe the migration services offered to assist a campus in transitioning from a different LMS provider or product.
- 8.2.4 Explain professional services available such as consulting, planning, performance tuning, programming, and others. (Note: the prime bidder is responsible for their subcontractor relationships and should demonstrate the qualifications and experience as applicable.) Respondents should document the nature of these relationships and include references for external consultants or services.
- 8.2.5 Describe project management services offered for new implementations and migrations.

8.3 Sandbox

- 8.3.1 A hosted sandbox for your product is required for accessibility evaluation purposes. Proposers must provide the URL and login information at the time of RFP response.
- 8.3.2 Please allow the sandbox to remain available to the UCO LMS Task Force until product/vendor selection is complete.

8.4 Migration

- 8.4.1 Describe the experience your company has in migrating a client's data from Blackboard Campus Edition 8.x to the proposed LMS.
- 8.4.2 Provide a list of best practices based on your experience with previous migrations.
- 8.4.3 Provide example migration plans.

8.5 Training and Training Materials

- 8.5.1 Describe training and training materials that are available both for end users and for administrators. Indicate which training and training materials are included with the license for each.
- 8.5.2 How can the institution customize the software documentation and training materials for their institution without incurring additional fees?

8.6 Hosting

- 8.6.1 What hosting/ASP (Application Service Provider) services are provided? Third party hosting/ASP services are acceptable (Note: the prime bidder is responsible for their subcontractor relationships and should demonstrate the qualifications and experience as applicable. Respondents should document the nature of these relationships and include references for third party vendor.
- 8.6.2 Where are hosting service personnel, service providers, data processing, data storage, and disaster recovery located? For example, within in the United States?
- 8.6.3 Describe levels of service that are provided?
- 8.6.4 List metrics used to determine level of service. How are the metrics calculated?
- 8.6.5 Discuss the client/vendor relationship in a service level agreement environment.

8.7 New releases

- 8.7.1 Describe your new release schedule? When was the last release? Is this a typical release schedule?
- 8.7.2 Define how often major releases are typically available. Minor releases.
- 8.7.3 How does the hosted systems release schedule differ from the release schedule?
- 8.7.4 Describe your philosophy regarding new versions of the product and whether they require a migration (internally or externally) from an older version.
- 8.7.5 Describe the process typically required to move to a newer version. (e.g. estimated downtime, site visit, etc.)
- 8.7.6 Describe the communications plan for a hosted system as updates are installed. How are updates managed with hosted clients? Who applies the updates, the vendor or the customer? What type of access is needed if vendor installs?

8.8 Hot Fixes

- 8.8.1 Describe the standard hot fix schedule? Are hosted systems and self-hosted on the same release schedule?
- 8.8.2 Describe whether hot fixes related to broken functionality of the product be back-ported to previous versions, or will they only be released for the most current version.
- 8.8.3 Describe the process for hot fixes related to security issues. Describe the order in which hot fixes are applied.
- 8.8.4 Can hot fixes be applied independently or does each one depend on all previous hot fixes being applied?
- 8.8.5 Describe the communications plan for a hosted system as updates are installed. How are updates managed with hosted clients?
- 8.8.6 How are updates managed with hosted clients? Upgrades
- 8.8.7 What is the downtime requirement for configuration changes and upgrades?
- 8.8.8 Define the following: Test Instance, Development Instance, and Production Instance. Include a statement regarding pricing as it relates to each. For example, do you allow a test instance or instances of your product at no cost? If no, what will be the charge for test only systems? There may be a need for multiple test systems. The term "Test instances" could encompass exploration environments for testing of new features, pilot environments for testing out updates or new versions. Essentially, could UCO campus have a production system as well as a test system setup that allows administrators to test out new updates without incurring additional license costs?

8.9 Other topics the UCO should consider in this area of LMS Support and Services?

9 Monitoring, Reporting and Assessment

9.1 Monitoring Tools

- 9.1.1 Describe the architecture and components of your system management and monitoring tool.
- 9.1.2 What tools work best with your product? Do you support component availability, logging, and tracking of events, problem determination, performance analysis and other metrics?
- 9.1.3 Describe monitoring integration with Enterprise Management tools such as HP SiteScope.

9.2 Standard Reports and Assessments

- 9.2.1 Show the standard reports provided with the system. Please provide the report title, a description of the contents and attach examples as an appendix.
- 9.2.2 Do these reports summarize the breadth of use per term (number of course sections, designers, students, etc)?
- 9.2.3 Do these reports summarize depth of use per term (# of emails, discussion boards, learning modules, calendar uses, etc)?
- 9.2.4 Describe the summary reports available that give information at the following levels:
 - 9.2.4.1 Student
 - 9.2.4.2 Instructor
 - 9.2.4.3 Course Section
 - 9.2.4.4 Course
 - 9.2.4.5 Department
 - 9.2.4.6 College
 - 9.2.4.7 University
- 9.2.5 Which of the reports listed above are available at the instructor role without administrator assistance?
- 9.2.6 Describe the reports and tools available for assessment of overall student learning and learning objectives at the following levels:
 - 9.2.6.1 Program
 - 9.2.6.2 Department
 - 9.2.6.3 College
 - 9.2.6.4 University
- 9.2.7 Describe the tools required to customize the standard reports. Is there an additional cost to do this?
- 9.2.8 List query and/or reporting tools available to access the data in the system.
- 9.2.9 Describe the documented database schema for clients.
- 9.2.10 Describe system performance when reporting. What is recommended to run reports?
- 9.2.11 Describe hardware or software requirements outside of the license in order to do this kind of reporting.
- 9.2.12 List tools to monitor the whole system. Do you provide one tool that gives a dashboard to monitor the system while it is up and running? (e.g. CPU, memory, processes, database, network traffic, e-mail alerts, number of concurrent users, etc. What kind of system alerts are provided by the system?

9.3 List tools provided to monitor metrics for any additional important application performance metrics.

9.4 Other topics the UCO should consider in this area of LMS Monitoring, Reporting and Assessment?

10 Product Roadmap and Vision for Product's Future

- 10.1 Please provide a graphic as well as a narrative description of the Product Roadmap providing a "big picture" of where the design and development of this product is currently going in the next two years. Provide the anticipated schedule for software enhancements and upcoming or planned releases. Where does the product stand in its current form and where is it going in the future (next 3 years or so)?

10.2 Limitations

10.2.1 Describe the product(s) limitations.

10.2.2 Describe areas being focused on in the near term to improve those weaknesses.

10.2.3 List areas being addressed in design or development right now.

10.3 Strengths

10.3.1 List the top 3 biggest strengths of the product(s)?

10.4 Describe what makes this product unique based on what is already in the market of higher education LMS.

6.0 Cost of Proposal – Pricing Structure

6.1 Provide Cost Proposal as per Attached Appendix A.

Cost proposals submitted in any format other than this Appendix will result in disqualification of the entire proposal. The total costs of proposed item(s), service(s), proposed solution(s), indicating whether each costs is one-time, incremental, or recurring costs for UCO after completion, should be clearly delineated within the proposal. Costs must be line itemed.

6.2 Payment Terms, Incentives, and Penalties

If payment is required on other than a 30-day (monthly) basis, by appropriate invoicing, please identify the vendor requirements. The University issues purchase orders and therefore will be invoiced by purchase order and pay by purchase order. Applicable vendor invoices should be billed within 30 days of completion of services and/or delivery of goods. Being the University has fiscal year funding and budgets, any disputes or payment issues must be addressed within the current fiscal year or within 45 days of each fiscal year close. Payments made by the University must be applied to the appropriate purchase order and applicable invoice, per the vendor's accounting system. Payments applied to the oldest vendor balance are unacceptable. Vendors are responsible for keeping current on any payment/invoice issues to insure appropriate receipt of payments.

6.3 Other Costs

If a form for the itemized costing of your proposal is not supplied by UCO in the Specifications, Section 5.0, or by way of attachment, please list on a separate sheet, any other costs, not included in the above, necessary to provide the equipment, goods or services of your proposal. Include associated cost and the reasons therefore. UCO must be able to clearly understand your proposal and the cost structure you propose.

6.4 Costs Proposed Based on Volume

This RFP, and any resulting contract, contemplates the possibility that UCO may wish to form purchasing partnerships or alliances with other higher education institutions to include, but not limited to, the Regional University System of Oklahoma and/or institutions in the Community College System. UCO reserves the right to re-negotiate costs and/or services on behalf of these partnerships and alliances based on the increased volume of business offered to our vendor partner. Additional savings offered by the vendor following these re-negotiations will be deemed as an amendment to the existing contract and made available to UCO's partners and alliance members.

APPENDIX A: Cost Proposal for Customer Hosted and Vendor Hosted Scenarios**Instructions:**

Respondents must submit this in completion of their Cost Proposal.

Fill in cost amounts for each hosting scenario included in your proposal by placing them in the appropriate column of the form.

Cost Proposals submitted in any format other than this Appendix will result in disqualification of the entire proposal.

Cost Element	Customer Hosted	Vendor Hosted
1. Software License Cost		
a) Based on headcount.		
Faculty Full Time 450; Part Time 475		
Student Full Time 11,250; Part Time 5,900		
b) Is license perpetual or annual?		
c) Provide license pricing details for:		
i. Production Server		
ii. Multiple Servers for redundancy		
iii. Test instance (For hosted, QA environment contains a replicated copy of all production data, periodically refreshed.)		
iv. Development instance		
v. Disaster recovery (For hosted, vendor must include a disaster recovery plan that includes tested recovery point and recovery time objectives).		
vi. An LMS system that would be available to run in parallel fashion with UCO's current LMS. Details should take into account UCO's intention to incrementally migrate courses to the new LMS, beginning with fewer courses initially and migrating more courses after the pilot program has ended.		
d) List any scheduled cost increases, annual or otherwise.		

2. Additional License Costs		
a) Technical and User Documentation		
b) Cost for non-credit student, customized training clients, employee and guest use licenses and method for licensing.		
c) Learning Object Repository (if not included in base license)		
d) Mobile Components or Services (if not included in base license)		
e) Reports/Analytics/Assessment Tool (if not included in base license)		
f) Additional license cost not included in base license cost if required to be purchased by UCO to achieve full functionality		
g) List any scheduled cost increases, annual or otherwise.		
3. Hosting Fees – if not included in base license		
a) Cost for 18,000 and up to 30,000 users.		
4. Training and Professional Services		
a) Training		
i) Administrator Training (3 seats)		
ii) Train-the-Trainer (5 seats)		
iii) End-User Training (22 seats)		
b) Implementation Costs		
c) Integration Costs		
i) Banner Integration		
ii) Luminis Integration		
d) Migration Support (List cost of services and pricing methodology to provide migration support, excluding course conversion costs)		
e) Conversion Costs (Include cost estimate of converting existing courseware (Blackboard CE 8) to new LMS (e.g., average cost per course; cost to migrate user database and other system data, etc.). Show itemized cost for conversion of existing courses. State any assumptions in the itemization)		
5. Maintenance and Support, Annual Maintenance Cost		
a) List the cost of annual maintenance and support costs		
b) List the cost of software upgrades if not covered in annual maintenance		

c) Indicate discount for prepayment of maintenance		
d) Support for UCO system administrators (escalation of issues, trouble shooting, etc.)		
e) Extended Premium Support for UCO system administrators		
f) List any scheduled cost increases, annual or otherwise		

Other Costs	Customer Hosted	Vendor Hosted
6. Additional Tools and Functionality (native to application) not included in base license cost		
a) Tool or functionality – describe		
b) Costs for each tool		
c) Options and price variations		
7. Third Party Software and Tools for Support of Application (if not included in base license cost)		
a) Describe each tool or functionality and state if it is required to be purchased by UCO to achieve for full functionality promised by proposal		
b) Provide detailed information on the product name/vendor/version/model number, etc. for each tool described in a) above		
c) Describe each tool or functionality and state if it is optional to be purchased by UCO to achieve full functionality promised by proposal		
d) Provide detailed information on the product name/vendor/version/model number, etc. described in c) above		
e) Indicate which tools can be acquired through the Respondent vs. third party vendors		
f) Costs if not included in base license cost		
g) Identify all options and price variations		
8. Feature Enhancements/Customizations State pricing methodology for enhancements and customizations if requested by UCO.		
a) Costs for initial move to customized product		
b) Costs for version upgrades		
c) List any scheduled cost increases, annual or otherwise		
d) If applicable, cost to UCO for customizing vendor documentation		

9. Hardware Cost		
a) Estimate the cost of hardware needed by UCO, only if applicable. Details should take into account UCO's intention to run the LMS system in parallel with its existing LMS system.		
10. Consulting Fees		
a) Identify the categories of consulting services provided and all respective consulting fees/rates, if not listed in Professional Services Section above.		
b) List costs for Time and Materials Consulting		
c) List any scheduled cost increases, annual or otherwise		
11. Help Desk		
a) Identify the categories and respective costs for support of all UCO end users		
b) List any scheduled cost increases, annual or otherwise		
12. Access to and Participation in Community Collaboration Describe and list costs associated with accessing and participation in Vendor's community site or means of community collaboration		
13. Additional Cost Information Include additional pricing information to convey that has not been previously addressed in this Cost Proposal		

By signing this statement, you certify the information provided in the Cost Proposal is accurate and that you are authorized to sign on behalf of the Respondent.

Name of Company: _____

Authorized Signature: _____

Printed Name: _____

Title: _____

Date: _____ Telephone number: _____

ATTACHMENT A**MUST BE COMPLETED, SIGNED, NOTORIZED, AND RETURNED**

STATE OF _____

SS

COUNTY OF _____

UCO PURCHASING AFFIDAVIT

I, _____, of lawful age, being first duly sworn, on oath say:

1. That I am the agent authorized by the Vendor _____ (Company/Firm Name) to submit the attached bid, which bid/proposal is a legal and binding offer and that by signing below he/she has authority to make said offer and bind the offering company, with minor differences and informalities to be resolved by negotiation prior to acceptance of the offer by UCO.

2. That this proposal is submitted in response to Request for Proposal _____ issued by the University of Central Oklahoma. The undersigned and firm agree to be bound by the content of this proposal, any specific terms and conditions noted within the RFP document, any addenda thereto in the event of an award to the Vendor, exceptions to be noted as stated in the RFP and UCO Standard Terms and Conditions which can be found on webpage and link: [http://www.uco.edu/administration/pur-pay-trav/info-for-vendors/index.asphat.ervices/Suppliers/Solicitation Documentation](http://www.uco.edu/administration/pur-pay-trav/info-for-vendors/index.asphat.ervices/Suppliers/Solicitation%20Documentation) The company's/firm's proposal shall remain in effect for a period of _____ () calendar days as of the Due Date for responses to the RFP, and that the person(s) authorized to negotiate in good faith on behalf of this firm for purposes of this Request for Proposal are:

Print Name_____
Print Title_____
Print Name_____
Print Title_____
Print Name_____
Print Title**3. Business Relations Section [Check this Box if not applicable],**

A. That the nature of any partnership, joint venture, or other business relationship presently in effect or which existed within one (1) year to the date of this statement with the architect, engineer, or other party to the project is as follows: (if none, please write "None")

(attach additional sheets as necessary)

B. That Affiant further states that any such business relationship presently in effect or which existed within one (1) year prior to the date of this statement between any officer or director of the proposing company and any officer or director of the architectural or engineering firm or other party to the project is as follows: (if none, please write "None")

(attach additional sheets as necessary)

C. That Affiant further states that the names of all persons having any such business relationships and the positions they hold with their respective companies or firms are as follows: (if none, please write "None")

(attach additional sheets as necessary)

4. Non-Collusion/Conflict Of Interest section, [With regard to any competitive bid for goods or services, which is issued by the State of Oklahoma or any of its agencies, Oklahoma laws require each vendor to execute and submit a notarized sworn Statement of Non-Collusion/Conflict of Interest, the following section of the Purchasing Affidavit fulfills that requirement.]

A. That by signing below, Proposer/Vendor certifies that in accordance with 74 O.S. §85.23, he/she or firm does not have any substantial conflict of interest sufficient to influence the proposal process on this proposal.

B. That (s)he is the duly authorized agent by the Proposer/Vendor to submit the attached bid for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the bid to which this statement is attached;

C. That (s)he is fully aware of the facts and circumstance surrounding the making of the bid/contract to which this statement is attached and has been personally and directly involved in the proceedings leading to the submission of such bid; and

D. That neither Proposer/Vendor nor anyone subject to the Proposer/Vendor's direction or control has been a party:

1. To any collusion among proposers in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
2. To any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
3. In any discussions between proposers and any state official concerning exchange of money or other thing of value for special consideration in the letting of this contract.

E. I certify, if awarded the contract, whether competitively bid or not, neither the Vendor nor anyone subject to the Vendor's direction or control has been paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma or the University of Central Oklahoma any money or other thing of value, either directly or indirectly, in procuring the contract to which this statement is attached.

F. That in accordance with 74 O.S. §85.42.b, the Proposer/Vendor further certifies that no person(s) who has been involved in any manner in the development of that contract while employed by the State of Oklahoma or University of Central Oklahoma shall be employed to fulfill any of the services provided for under said contract.

G. Completed W-9 must be attached.

Further Affiant sayeth Not.

Signed

Title: _____

Company

F.E.I.N. Number: _____

Subscribed and sworn to before me this ____ day of _____, 20__.

(SEAL)

Notary Public Commission Number: _____

My Commission Expires: _____

ATTACHMENT B **MUST BE COMPLETED, SIGNED, AND RETURNED**

VENDOR QUALIFICATION / FINANCIAL RESOURCE STATEMENT

The undersigned agrees that the response to this bid / proposal is a legal and binding offer and that by signing below he / she has authority to make said offer, identify the contact point and those authorized to negotiate for the company / firm, the contact and other information presented is current and accurate, and the company / firm is financially responsible and capable of fulfilling its financial obligations and responsibilities under this bid / proposal.

A. Authorized negotiator(s): if different from person signing form or in addition to person signing form if any (if 'none' so state by initialing): _____ None
INITIALS

1. _____
Signature

Print / Type Name

2. _____
Signature

Print / Type Name

3. _____
Signature

Print / Type Name

B. Official Contact Address: _____ **Phone Number:** _____

_____ Fax Number: _____

C. Type of Organization:

If incorporated, in what year and which state(s): _____

 Sole Proprietorship Partnership

☐ Private Corporation ☐ Public Corporation

____ LLC ____ Other (Explain): _____

D. Description of Business:

Number of locations or branches: _____

Number located in the State of Oklahoma and where:

Number of person currently employed (company wide): _____

Number located in the State of Oklahoma:

Original date of Establishment (if not incorporated): _____

Classification: ☐ Small Business ☐ Disadvantaged ☐ Women-Owned

Total number of years in business: _____

Total number of years in the type of business requested by RFP: ____

Type of Work:

_____ Manufacturer _____ Distributor _____ Retail Dealer

_____ Service Other: _____

_____ Business Enterprise

Certification / License Nos. assigned and from whom (if any): _____

_____ Construction:

☐ General Contractor ☐ Design-Builder ☐ Material Supplier _____
Indicate Type☐ Sub-Contractor: ☐ Mechanical, ☐ Plumbing, ☐ Electrical,☐ Other sub: _____
Indicate Type

Sales Contact Name: _____

Sales Contact Address: _____

Sales Contact Phone Number: _____

Sales Contract Fax Number: _____

Sales Contact Email Address: _____

Customer Service/Order Entry Contact Name: _____

Customer Service/Order Entry Phone Number: _____

Customer Service/Order Entry Fax Number: _____

Customer Service/Order Entry Email Address: _____

Website Address: _____

Accounting Contact Name: _____

Accounting Contact Address: _____

Payment remit to address, if different than the above:

Accounting Contact Phone Number: _____

Accounting Contact Fax Number: _____

Accounting Contact Email: _____

E. Reference Request:

Please include three (3) references for clients with whom your company has competed projects of similar size and scope. Preferred references would include those with whom you have had long term partnerships and those within the realm of higher education. **Include all contact information. All shall be noted on a separate sheet, included in the proposal.**

F. Financial Resource Information:

[The following information will assist UCO in evaluating the comparative financial resources of competing Proposers/Vendors. It is understood and acknowledged that the information is requested by UCO solely as an indication of the Proposer's fiscal responsibility.]

Dun & Bradstreet Bidder/Supplier's Number: _____

F.E.I.N. Number: _____

The Vendor's primary bank:

Name: _____

Address: _____

Account Manager: _____

Telephone number(s): _____

Fax number(s): _____

Note: *If the current bank account has existed less than one year, furnish the above information for the previous bank as well.*

IF requested will you provide a Financial Statement: _____ Yes _____ No

If 'Yes' will it be Audited _____ or Reviewed _____

The above and foregoing are true and correct to the best of my knowledge.**Witness,** this _____ day of _____, 20____, by:_____
Signature_____
Typed / Printed name_____
Title_____
Company / Firm

ATTACHMENT C**MUST BE READ, SIGNED, AND RETURNED****Certificate of Compliance with Executive Order 11246 (as amended)**☐ For Contracts/ Subcontracts in excess of \$10,000☐ For Contracts in excess of \$50,000 or Contractors with over 50 employees

During the performance of this contract, the Vendor agrees as follows:

(1) The Vendor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The contractor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex or national origin. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Vendor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.

(2) The Vendor will, in all solicitations or advancements for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.

(3) The Vendor will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or workers' representative of the contractor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(4) The Vendor will comply with all provisions of Executive Order No. 11246 of Sept. 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(5) The Vendor will furnish all information and reports required by Executive Order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(6) In the event of the Vendor's noncompliance with the nondiscrimination clauses of this contract or with any of such rules, regulations, or orders, this contract may be cancelled, terminated, or suspended in whole or in part and the contractor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of Sept. 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(7) The Vendor will include the provisions of paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor or vendor. The Vendor will take such action with respect to any subcontract or purchase order as may be directed by the Secretary of Labor as a means of enforcing such provisions including sanctions for noncompliance: Provided, however, that in the event the contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction, the contractor may request the United States to enter into such litigation to protect the interests of the United States." [Sec. 202 amended by EO 11375 of Oct. 13, 1967, 32 FR 14303, 3 CFR, 1966-1970 Comp., p. 684, EO 12086 of Oct. 5, 1978, 43 FR 46501, 3 CFR, 1978 Comp., p. 230]

By signature below, I / we agree (check the box that is appropriate, date and sign):

☐ to comply with the terms of Executive Order 11246 for the purposes of the solicitation to which this is appended. Or,

☐ that I/we (said organization) is already in substantial compliance with Executive Order 11246.

Witness my hand this _____ day of _____, 20____.

Signature

Print Name

ATTACHMENT D

Completed W-9 must accompany the Vendor proposal. Blank document can be found at the following link:

http://www.uco.edu/administration/pur-pay-trav/_info-for-vendors/index.asp