

1. Timetable

Salem State University has one clarification regarding the deadline for the RFP. It is noted that it currently stated 3:00 PM Eastern Standard Time (EST). Acknowledging that we are going into a daylight savings period, the deadline will be 3:00 PM Eastern Daylight Time (EDT) on March 13, 2019.

2. Questions

Q: Whether companies from Outside USA can apply for this? (like, from India or Canada)

A: Yes.

Q: Whether we need to come over there for meetings?

A: Yes, if requested.

Q: Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

A: Yes.

Q: Can we submit the proposals via email for RFP 2019-07 Student Success Software System?

A: Yes.

Q: We were preparing our response and noticed that Question #20 is missing in the attached document. Is there an additional question that we should answer?

A: It appears our numbering is off. There is no #20

Q: Will Salem State University be willing to negotiate final terms after making an award decision from this bid?

A: Once the award decision is made, we will seek the best and final offer. No negotiations after award decision.

Q: Regarding your question "Does the software have an integrated survey capability? If so, please describe the survey functions available in the product." Can you please describe who would be surveyed as well as the purpose of the surveying?

A: This could be used in determining student risk, or aid in areas where students may benefit from assistance.

Q: Does Salem State University have a budget for this Student Success project? If so, what is that budget?)

A: Yes, estimated budget is \$300K-\$360K, annually.

Q: Does Salem State University currently have any solution in place for the following: degree planning/auditing; analytics; or early alert? If so, please provide what solutions you have in place.

A: We use degree tracker through PeopleSoft and Mapworks for early alert.

Q: Are you able to provide the names and titles of the team members who will be on the review/evaluation committee?

A: Names at this time are being withheld. Titles and departments are as follows:

- Associate Dean, School of Education
- Senior Director, Retention Services
- Associate Director, Retention Services
- Director, First Year Experience
- Deputy CIO
- Staff Associate, Academic Advising
- Assistant Dean, Student Life

Q: With this CRM proposal do you want a Registration and Curriculum component (as indicated by Requests 22 and 23) or integration to Peoplesoft Campus Solutions (per Request 53).

A: The short answer is both.

Request #53: Integration with PeopleSoft is ideal, but we acknowledge some vendors do not have integration services. If your product does integrate with PeopleSoft, please state that, if it does not, specify how we load data in to your system from our system.

Requests #22 and #23: Once data is in your system, how will it meet these requirements.

Q: Please confirm that the award notification and presentation will occur 4 business days after the RFP submission. Does this suggest Salem State has a vendor already in mind?

A: No, a vendor has not been identified.

Q: Regarding 16. Terms and Conditions, B 1 and 2 - how is performance evaluated? what is involved? Please elaborate on "Red Flag Rules" Customer Payment and Privacy Protection Conditions - are you referring to the Customer being yourselves? Or Customer being the application users?

A: Performance evaluation will include whether the implementation occurred on time as expected, what complications arise, if any stemming from the vendor, and if projected vendor specified metrics are met. Salem State must ensure all information passed to your system is maintained to the highest standards and the vendor complies with all federal and state regulations. Salem State is referenced as the Customer in this section.

Information regarding Red Flags Rules can be found at

Federal Trade Commission 'Red Flag' Procedures

<http://www.ftc.gov/bcp/edu/microsites/redflagrule/index.shtml>

Any vendor who touches our PII will be required to sign the SSU PI Information Protection Questionnaire/Checklist (PPIO) for vendors.

Q: Given the comprehensive scope of the RFP, would Salem State be willing to grant a 2-week extension?

A: No.

Q: Would a cover letter highlighting our capabilities as it relates to what Salem State is seeking be accepted in our submission?

A: The RFP must be completed and submitted as specified within the RFP.

Q: How many undergraduate students will be accessing the Student Success System?

A: Approximately 6,500.

Q: How many graduate students will be accessing the Student Success System?

A: Approximately 1,500.

Q: Excluding students, how many users (staff / faculty) will be accessing the Student Success System?

A: Approximately 1,500.

Q: How many of the staff / faculty that will be accessing the system are full-time employees?

A: Approximately 900.

Q: How many of the staff / faculty that will be accessing the system are part-time employees?

A: Approximately 600.

Q: How many users will be creating surveys?

A: This is to be determined at this time.

Q: Do the students, undergraduate, and graduate, have Active Directory Accounts?

A: Yes.

Q: Is Active Directory setup as the IAM/SSO solution at SSU? If not, please confirm the name of the IAM/SSO vendor in place, or if no IAM/SSO vendor is currently being used at SSU?

A: Yes, we use ADFS.

Q: Please confirm the version of Microsoft Exchange (Outlook) that is deployed at SSU.

A: Office 365.

Q: Please confirm if, and which Extract, Transfer, Load (ETL) tool SSU is currently using for data integration.

A: Jitterbit.

Q: Would SSU like to provide student communication options through SMS (texting)?

A: Yes.

Q: Would SSU like to provide student communication options through social media channels? (ex: Facebook)

A: Possibly.

Q: Can SSU buy off NASPO Value Point Contract (formerly WSCA-NASPO) of which the Commonwealth of Massachusetts is a member?

A: Yes, if it has been publicly bid.

Q: In RFP Section 5 – Single Contractor’s Award, Salem State notes that it will award a “single contract.” What is Salem State’s preference for handling vendor contracting for an annual licensing component as well as initial implementation services?

A: When we say single contract, we mean we will award to one vendor, not multiple vendors.

Q: Is point #57 ‘describe how the vendor deals with discontinuation of operation’, is this asking for the description of the process of how Salem State University could choose to discontinue the use of the vendor’s software, or the process if the vendor ceased operations.

A: Salem State University is seeking information on both scenarios, with interest on if the vendor ceased operations.

Q: Understanding that the bid response is to be electronically submitted. Will SSU accept a digital signature for bid submission, or must the bid be physically signed, scanned, and then sent electronically?

A: Yes, digital signatures will be allowed.

Q: Regarding Section 7, can you please confirm vendors should submit their responses via email to Evelyn Wilson, Director of Purchasing, not through Comm-Pass?

A: Yes.

Q: For requests #21-71, can vendors respond outside the grid (i.e., in prose format vs. the provided chart)?

A: No.

Q: Would it be possible to access a copy of the Salem State PI Information Protection Questionnaire?

A: Yes, it will be attached at the end of this addendum. (See pages 5-6)

Q: I have a question regarding clarification on long answers with screenshots. You do not want #21-71 to answer outside of the table; is that applicable to #1-19 as well? Can we include screenshots as appendices or how would Salem State prefer those to be referenced?

A: Appendices would be preferred.



Personal Information Protection Questionnaire/Checklist (PPIQ) for Vendors

The following information is intended to provide reasonable assurances that Personal Information (PI) that is handled by vendors and providers of services to Salem State University (SSU), for the University to fulfill its mission, is protected from unauthorized access and/or illicit use.

I - Vendor Contact Information:

Vendor Name: _____

Address One: _____

Address Two: _____

City/Town: _____ State: _____ Zip: _____

Contact Person: _____ Title: _____

Tel. (Office): _____ Tel. (Cell): _____ E-mail: _____

II – Services and Data Required

Services provided to or being proposed to be provided to Salem State University requiring the need for Personal Information (PI): _____

What PI is acquired, transmitted, processed and/or otherwise handled via your process/system? (Please attach any additional clarifying information)

- Name Address Tel SSN Credit/Debit Card Bank Acct. Date of Birth Other Birth Data
- Driver’s License # Motor Vehicle Data Passport Visa Other Demographic Biometric
- E-mail

Please specify other PI and/or descriptions for above: _____

III - PCI Certification

If your business processes payment card information or you have a relationship with a third party who will be processing such information on behalf of Salem State University, your company must certify that copies of the Payment Card Industry (PCI) Security Standards Council, Self-Assessment Questionnaire(s), Attestation(s) of Compliance relevant to your /both organization(s), have been completed within the last year, are on file and meet all PCI standards.

- Yes No

IV – Confirmation of Security Measures to Protect PI

1. Do you have a comprehensive, Written Information Security Program (“WISP”) applicable to all records containing personal information?

2. Does the WISP include administrative, technical, and physical safeguards for protection? Please explain.

3. Have you designated one or more employees to maintain and supervise WISP implementation and performance?

4. What procedural measures/internal controls do you have in place to protect PI that is acquired via your system (e.g. restriction of system access, documented policies & procedures, segregation of duties, system security monitoring & reviews)? Attach any additional clarifying information.
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5. Has your company or organization ever been cited by any oversight, standards setting organization, regulatory body, or audit for deficiencies with regard to protecting PI?
 Yes No If 'Yes' please explain in detail below. Attach any additional detailed explanation.
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6. Have you read and understand Commonwealth of Massachusetts Executive Order 504 Regarding the Security and Confidentiality of Personal Information? <http://www.mass.gov/courts/docs/lawlib/eo500-599/eo504.pdf>
 Yes No Attach any additional detailed explanation?

7. Have you read and understand Commonwealth of Massachusetts data protection regulation 201 CMR 17?
<http://www.mass.gov/ocabr/docs/idtheft/201cmr1700reg.pdf>
 Yes No Attach any additional detailed explanation?

8. Have you read and understand Commonwealth of Massachusetts General Law 93H Requirements for Security Breach Notifications? <http://www.malegislature.gov/Laws/GeneralLaws/PartI/TitleXV/Chapter93h> Notifications?
 Yes No Attach any additional detailed explanation?

9. Have you read and understand read Federal Trade Commission Red Flag Rules and established polices consistent with these rules? <http://www.ftc.gov/tips-advice/business-center/privacy-and-security/red-flags-rule>
 Yes No Attach any additional detailed explanation?

10. Has your company ever experienced a breach of confidential information? If 'Yes', please explain in detail including the resolution and the current status. Please attach additional sheets if necessary.
 Yes No

Authorized Vendor Signature: _____ **Date:** _____
(Signature indicates compliance with statutes, regulation and standards regarding the protection of Personal Information and/or PCI Standards)

Title: _____