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March 26, 2021

RFP ADDENDUM #1

Reference – Request for Proposal:	GMU-1731-21
Title:	Coaching & Advising Platform System (Software)
Dated:	February 18, 2021
For Delivery To:	George Mason University

The following changes are hereby incorporated into the aforementioned RFP:

Please make sure to sign and include this addendum and all other addendums issued under this RFP with your offer/proposal.

- **Answers to Questions received by March 05, 2021 at 4:00PM.**

Answers to these questions will be considered part of the RFP and the vendor should include any changes that result from this addendum into their offer. Failure to consider the information provided below may result in your offer being scored lower:

- 1. Question:** Will Mason allow separate contracts for software and services in response to this RFP?
Answer: It is Mason's intent to award one contract to one contractor for all goods/services necessary to meet the requirements and fulfill the statement of needs/scope of this RFP. However, Mason reserves the right to award multiple contracts to multiple offerors if it is in the best interest of Mason.
- 2. Question:** Does GMU have a list of preferred implementation partners?
Answer: No, Mason will not supply a list of preferred implementation partners. The Offeror will be responsible for providing all goods/services/software/systems, including implementation services, as part of their offer. If your firm is unable to provide this service (or meet any other requirement of the RFP) please clearly state as such in your offer. If you plan on subcontracting (or teaming) with another firm to provide any goods/services as part of your offer please clearly state as such in your proposal.
- 3. Question:** For work at Mason, does the Implementer have to be preapproved or do they gain approval through their response to this RFP?
Answer: See the answer to Question 2. Above. If the Offeror plans on subcontracting out these services, or teaming with another firm to provide these services, the Offeror needs to state as such in their offer and define who their subcontractor/teaming partner will be and what services/goods they will be providing. Please note that Mason will not agree to enter into a separate agreement with the subcontractor or teaming partner and the Prime Offeror will be responsible for all tasks/contracting with the sub/teaming partner. Mason

reserves the right to request and check the sub-contractors references and perform any other review or check to ensure the subcontractor can meet the requirements.

4. **Question:** Does Mason plan to request that this project be entirely remotely managed, or would both onsite and remote services be a possibility?

Answer: Mason's current preference, due to the pandemic, is that any work that can be performed remotely be remote but we will not penalize or score a contractor lower if they need to come on site to provide services (that is not an evaluation criteria or requirement of the RFP). If the Offeror needs to come on site to perform services please clearly state as such in your offer. All Contractor's who come on site are required to follow Mason's COVID19 Contractor Expectations/Guidelines and will be required to meet the Background Check, Insurance, and other site-specific clauses outlined in the Sample Contract of the RFP.

A link to the Contractor COVID19 Guidelines is as follows: https://fiscal.gmu.edu/wp-content/uploads/2020/07/Contractor_Expectations_of_Employees_COVID.pdf

5. **Question:** Is the intention to have a single advising/coaching solution across Mason?

Answer: Yes

6. **Question:** How many full access users (able to configure the system, update settings/workflows, create and manage campaigns/communication plans, use live chat, write reports, other higher-level functions) do you anticipate will access the solution? Please provide an estimated number of Full Time, Part time, faculty users.

Answer: There are approximately 158K users in the current system. 153K are student role users, with about 54K student users active in a semester. There are about 4K users who have the professor role, while a bit less than 1K have an advisor/coaching role. There are about 100 administrators and location administrators in the system. Note that multiple users have crossover roles.

7. **Question:** Is there a phasing plan for the project to cover implementation of different departments/colleges/groups and aspects of the solution? If so, please explain further.

Answer: Mason would prefer to utilize a pilot as part of an initial soft launch of the solution using a representative group of users. Additionally, Mason expects to plan, coordinate and execute the implementation of the solution with the selected partner after contract award. Please refer to proposal submission requirements regarding inclusion of an implementation and release plan, and a recommended support model.

8. **Question:** Are there any systems Mason plans to retire following this project engagement? If yes, please explain further.

Answer: Unknown at this time.

9. **Question:** Please provide additional detail regarding the use of managed packages/products in Mason's existing Salesforce environment, if available, please provide a current version and list of functional modules that are deployed.

Answer: The list is as follows:

- Multiple native Salesforce tools including **Salesforce Chat**, **Service Cloud**, and **EDA**
- **TargetX Product Suite** for admissions application, review, portal, messaging (2 instances: Lifecycle and Graduate) including: TargetX Recruitment-specific Fields,

Workflows, and Triggers, TargetX Pre-configured Reports, TargetX Email, TargetX Events and Appointment Scheduler, TargetX Engage, TargetX Telemarketing, TargetX SMS (text messaging), TargetX Print (document creation), TargetX Inquiry Forms, TargetX Pre-built Vendor File Imports, TargetX Application, TargetX Application Review Tool, TargetX Portal Builder, TargetX UChat

- **Mogli** for text messaging.
- **Demand Tools** as an ETL tool
- **Informatica** as the primary ETL tool
- **Form Assembly** to host Salesforce related forms

10. **Question:** Will this advising solution specifically serve Undergraduates, or will it serve additional groups such as Grad and Online? Please explain further.

Answer: The coaching and advising solution will serve both online and non-online undergraduate and graduate populations. Mason will initially focus on undergraduate students (both online and non-online), then focus on extending the solution to graduates (both online and non-online). There is no requirement that the implementation of the overall solution for both populations be identical. It is expected that the solution be flexible enough to tailor for either population. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, data model concept and recommended support model.

11. **Question:** Are geolocation-based communications in-scope for this project? (Ex: Student enters 500-meter radius of library and is reminded of tutoring)

Answer: There is no requirement for geolocation-based communications. Vendors are welcome to propose options that would enable a more engaging student experience. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, and a recommended support model.

12. **Question: Section X. Background (Page 4)** Aside from EAB Navigate, what other solutions or technologies are currently supporting coaching/advising efforts on campus?

Answer: In addition to EAB Navigate, Mason currently utilizes DegreeWorks, MicroStrategy, Banner, TargetX, Salesforce and data from Mason's Enterprise Data Integration Service (EDIS) to support coaching and advising efforts. Our Learning Services organization uses a technology called Titanium to record student information. Related to the answer to Question 37, our Mason Care Network organization uses a third-party vendor system (uCoach by InsideTrack - <https://www.insidetrack.org/>) to record student coaching sessions.

13. **Question: Section X. Background (Page 4)** Would the system require integration with current advising system EAB Navigate?

Answer: It is expected that data and/or capabilities from any systems supporting Mason's coaching and advising efforts may be proposed as part of an integrated solution. However, there is no requirement that the selected solution integrate with EAB Navigate. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, data model concept and recommended support model.

14. **Question: Section X. Background (Page 4)** The ADVANCE program (<https://www2.gmu.edu/admissions-aid/advance>) is a dual enrollment relationship with a

community college with a very tight transfer plan agreement. While students are enrolled at NOVA, but have access to GMU facilities; will they have access to services that will be recorded in the Advising system? Will advisors/coaching staff at NOVA have or need access to the advising solution under a separate security role? Or will the solution ONLY be accessed by GMU representatives?

Answer: NOVA advisors and coaches should be able to enter data into the solution under a separate security role. Mason ADVANCE coaches are Mason employees and will have the same security role as MCN coaches. NOVA students will be accessing Mason services. Data about NOVA ADVANCE students should be captured/recorded and accessible in the future system. Note that currently, ADVANCE students who are degree-seeking at NOVA are Non-Degree Seeking status in Mason's systems. Additionally, a means of recording and storing sessions with students is required.

15. **Question: Section XI. Statement of Needs (Page 4)** Regarding integrations, does Mason want the vendor to perform integration tasks or will Mason be managing integrations with the help of its selected implementation vendor?

Answer: Mason expects to have some Salesforce resources available to assist or co-manage the selected implementation vendor with integrations. Proposals may include multiple options for implementation, operations and maintenance. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, data model concept and recommended support model.

16. **Question: Section A. Implementation Partner Requirements (Page 5)** Referring to Section 2. Assist with transition of data, what historical records will need to be migrated? How many records will need to be migrated?

Answer: In addition to the answer provided, please refer to the answer for Question 6. The type and number of historical records to be migrated is highly dependent on the solution selected/awarded. Mason is currently able to provide the following information and assumptions:

- Assumption: Based on the Commonwealth of Virginia's Records and Retention Policy, some records can be migrated directly into the new system. However, older records from non-matriculating students or alumni may need to be migrated to WebExtender (part of Banner Document Management).
- Assumption: Sensitive student data may require additional approval processes and/or alternative processes or storage requirements
- It is expected that records from the following areas may be migrated or shared with the new system:
 - the current EAB Navigate system
 - recordings of student sessions from 3rd party systems (see Question 37)
 - some data within Banner Document Management
 - graduate and/or undergraduate student data from Salesforce
- Integration between the current EAB Navigate system and Banner does not exist. Mason relies on a proprietary workaround with the EAB Navigate vendor to import data into Banner.
- Coaching & advising data from the EAB Navigate system does not migrate to Banner
- Banner data related to student status at Mason can migrate into the current EAB Navigate system
- Due to rolling admissions, frequent data migrations are required from Salesforce to Banner
- Additional Complexity for undergraduate ADVANCE students:
 - ADVANCE coaches reside at both Mason and NOVA

- Both Mason and NOVA use corporately separate instances of the EAB Navigate system
- ADVANCE coaches at Mason also use Salesforce
- NOVA systems for ADVANCE students:
 - PeopleSoft - A once/1x per semester load of student data from PeopleSoft is migrated into Mason's Salesforce instance for ADVANCE students coming from NOVA. The load of PeopleSoft data is managed by Mason's Enrollment Management Salesforce Team along with the Mason Admissions Technical Team. NOVA's Admissions technical staff supports this process.
 - Salesforce – NOVA's migration to Salesforce is ongoing. No additional is available at this time.

17. **Question: Section B. Key Business Requirements (Page 5)** Please provide additional description for "Agility and resilience – rapid change & recovery in uncertain conditions"

Answer: Wherever feasible, Mason would appreciate being made aware of options or features that would support and enable our need to quickly pivot operations for coaching & advising in response to unforeseen circumstances (e.g. pandemics, students impacted by international policy changes, at-risk students, etc.). This can be in the form of recommended data integration strategies, backup and retention options or policies, data export options, implementation options or approaches, alternate user roles to support additional students, processes, workflows or best practices, etc. that work in both in-person, virtual or distanced scenarios.

18. **Question: Section B. Key Business Requirements (Page 5)** Is there a need for dedicated Student App (App Store / Google Play) for a more engaging student experience (i.e. - push notifications, geo-fencing, etc.)?

Answer: There is no requirement for geolocation-based capabilities or a dedicated Student App. Vendors are welcome to propose options that would enable a more engaging student experience or offer flexibility in the operation of the system. Please refer to proposal submission requirements regarding inclusion of an implementation and release plan, and a recommended support model

19. **Question: Section E. High Priority System/Solution Functional Requirements (Page 5)** Referring to Section 3. Integration, please detail Mason's current integration architecture/strategy and preferred ETL tool to manage integrations. Is a data lake or data warehouse available?

Answer: Mason's Enterprise Data Integration Service (EDIS) utilizes Informatica Intelligent Cloud Services (IICS) to support application and data integrations. Mason has an Enterprise Data Warehouse (EDW) available. Both are owned and managed by Mason's Information Technology Services (ITS) organization. However, our EDIS and EDW integration model prefers near real time integrations using APIs through Ellucian Ethos for Banner, or Publisher/Subscriber models for integrated applications.

Mason's primary ETL tool for use with Salesforce is also Informatica, with some use of Data Loader. Mason's Salesforce instances are owned by Mason's Enrollment Management organization, and maintained by both Enrollment Management and ITS resources. It is expected that Informatica will be the primary tool for ETL for integrations.

20. **Question: Section E. High Priority System/Solution Functional Requirements (Page 5)** Please further elaborate on the intended use cases for an advising portal. Aside from communicating with members of the success team, or other students, and making appointments, what else should advisees have access to via the portal (e.g., Knowledge for FAQs, or policies, other static information, etc.)?

Answer: The portal should be able to support educational modules for advising based on meeting type request (e.g., academic policies/procedures) and, if possible, allow students to upload documents or respond to fillable documents for advising purposes. For example, if a student schedules a meeting for registration, they will need to complete a form indicating their proposed class schedule and answer other necessary questions that will allow for more in-depth conversations during registration advising appointments.

Also, providing links to educational material required before an appointment would be beneficial. For example, if a student schedules an appointment about enrolling in experiential learning opportunities, advisors would like to direct students to the most common opportunities for education prior to attending an appointment so that the appointment is more focused on the experience and not educating about where a student would go to find static information.

Additionally, the portal should ensure that students are able to view past appointment notes from advisors and previously viewed communications. The current inability for the advisors to refer students back to previously shared advising or appointment notes is a significant issue for coaches and advisors. Examples of other items advisees should be able to access include:

- Knowledge Articles
- Appointment Information
- Ability for all users to create/log support cases via Salesforce (Example: Mason Student Services Center support cases <https://mason.secure.force.com/form/?formid=218232>)
- Notices from Student Support offices, such as the Registrar
- Previous Advising Appointment Notes
- Full List of Mason Support team (Ex. Advance Coach, MCN Success Coach)

21. **Question: Section E. High Priority System/Solution Functional Requirements (Page 5)** Should any aspect of a constituent portal be publicly available? Or should all of it be behind SSO?

Answer: In addition to the answer provider here, please reference the answer to Question 22. Yes, there will need to be a portion of the constituent portal that is not behind SSO. Mason's staff and students are required to use only their Mason email address for communication. No use of external personal email addresses is permitted. Mason will want to use SSO for both staff and student portals. Mason prefers the use of Shibboleth primarily, but can leverage Central Authentication Service and Active Directory Federation Services.

However, some colleges such as the College of Education and Human Development and the College of Visual and Performing Arts, provide limited advising with prospective students and current applicants who have yet to be admitted, and may also need to connect with students who are not currently matriculating. There will likely need to be different service options for these student populations who are not behind SSO, and Mason has yet to determine the full extent of those service options.

22. **Question: Section E. High Priority System/Solution Functional Requirements (Page 5)** What Single Sign-On (SSO) technologies would need to be integrated? What is the preferred identity provider?

Answer: In addition to the answer provided here, reference answer to Question 21. Mason will want to use SSO for both staff and student portals. Mason has the capability to use Central Authentication Service, Shibboleth or Active Directory Federation Services, and prefers Shibboleth.

23. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** What is/are the current marketing automation solutions serving the following communications channels: email, mobile/SMS/text, social media, telephone, ground mail?

Answer: We currently use email and mobile/SMS/text through our current advising and coaching platform and would require that in a future system. Social media, telephone, and ground mail is not a system requirement through the platform.

24. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** How is text messaging done today?

Answer: In addition to the answer provided here, reference the answer to Question 23. Text messaging is done in the current coaching & advising system and initiated by the coach or advisor. Though there are character limitations, we currently have the capability to text individual users or a small group of students. Due to our internal policies, we advise against spamming students with text messages and only utilize this function for critical, targeted communication.

25. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** Are Mason's advisors responsible for advising-related engagement activities (e.g., Campaigns, tasks, etc.) or are there dedicated engagement staff responsible for this activity?

Answer: Yes, all advisors and coaches are responsible for sending their own engagement to students. Leadership will also create and engage with students. Each unit has their own practices. Most advisors have access to create advising related activities like campaigns. Additionally, they can create written communications relating to documenting advisor/coach-student interactions through appointment reports, notes and follow-up emails. Advisor functions vary across colleges, but many larger colleges are supported by engagement staff members.

26. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** Does Mason expect that advising staff will work from their Outlook calendar to manage their appointments (including viewing their upcoming advising appointments)? Or can advisors work out of the Salesforce calendar in order to manage their appointments?

Answer: While enforcement varies, coaches and advisors are required to utilize their Outlook calendars as the basis for their availability for upcoming coaching and advising appointments. Currently the Navigate system allows the advisor to sync their calendar to the Outlook 365 calendar or to other calendars like Google, at the option of the advisor/coach. The majority of the advisor/coaches sync their calendars to Outlook 365. Please also refer to Question 31.

27. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** Approximately how many coaching/advising appointments happen per week/month on campus?

Answer: Mason does not have a means to gauge "logins" to the Navigate that we are

privity to. Though, based on the number of appointments made in the system, it's clear that hundreds, if not thousands, of coaching and advising appointments occur on a weekly basis. However, this number varies based on the life cycle of a student during the academic year.

To illustrate, over a six-month period from September 2020 to February 2021, Navigate recorded a bit over 27K appointments, or an average of about 4500 per month. Based on current data the months of significant appointments include:

- 10/1/20-10/31/20 (7160 appointments)
- 11/1/20-11/30/20(6389 appointments)

The total for this peak advising period is 13,549 with 10,046 being distinct appointments. High appointment traffic data for Spring 2021 is not yet available. However, to date, between 1/1/21-3/17/21 8511 academic appointments have been scheduled/attended. These numbers do not reflect appointments made using other platforms (e.g., email, drop-in advising). Additionally, academic advisors were not required/highly recommended to record appointment data until the 2020-21 academic year.

28. Question: E. High Priority System/Solution Functional Requirements (Page 6) What telephony integration will be needed?

Answer: The new solution will need to be able to successfully integrate with Zoom and/or MS Teams, so that advisors can host students in virtual advising sessions on Mason supported platforms. Additionally, all “virtual” sessions will need to be stored as at least an activity on the students record for reporting purposes. Additionally, Mason requires the inclusion of texting capabilities (see Question 23 and Question 24) as well as the option to record sessions separate from within the primary system when Zoom and/or MS Teams is not being used. Also, please refer to the answers for Question 31 and Question 37.

29. Question: E. High Priority System/Solution Functional Requirements (Page 6) To "Show 'em you know 'em," what types of communications are envisioned with the solution? (Email, SMS, app notification, etc.)

Answer: First and foremost, “Show ‘em you know ‘em” is about ensuring that students are not required to continually re-enter information we already have about them, such as their name, G#, and even the details of previous meetings. If we are able to rely on a connection of the new solution to Banner, Shibboleth Single Sign (SSO) on will solve many of these issues. Examples of communications include:

- Email Example - Merge in details from their student record. (e.g. “Majoring in X can be hard. Please make sure you come see me so I can help!”- Y Advisor Name Assigned to Student)
- SMS Example - Merge in details from their student record OR trigger specific SMS based on student type. (e.g. “Student X, your registration opens tomorrow. Please visit www.registrar.gmu.edu for details on your time ticket for course registration.)
- Application Push Notification Example - Send a push notification 10 minutes before scheduled appointment with room number or details of Zoom meeting.
- Online Chat Example - Student logs in via SSO and to start chatting with their advisor, they don't then have to re-enter their name, G#, netID, etc.

Please also refer to the answer to Question 31.

30. Question: E. High Priority System/Solution Functional Requirements (Page 6) Will individual advisors be responsible for sending post-advising follow up communications to advisees? Or should this be part of automated communications programs?

Answer: Both. Mason is interested in the option to offer automated options for coaches and advisors where feasible.

31. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** Will individual advisors need to send branded emails to students?

Answer: Yes, all coaches and advisors will need to have the ability to send branded, HTML messages that support merge fields from the system and calendars (e.g. “Your appointment is at X date and X time with X advisor.”).

32. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** How many paper or web forms are currently used and what information is sourced from these forms?

Answer: Advisors and departments use about 40 forms. Most are listed on the Registrar’s Office website (<https://registrar.gmu.edu/forms/>). Others are controlled forms. All but 2 forms are paper/manual forms that can be emailed or handed to the Registrar’s Office. These forms involve enrollment and registration status updates or changes. The 2 forms that are electronic are Temporary Grade Change, which changes a temporary grade like IN to a letter grade, and Program Elective Approval, which approves elective courses to be placed in a specific degree requirement in the student’s degree audit.

There are additional forms that are specific to each department and college/school to handle the enrollment and registration approval process. There are also forms that are relevant to the Advisor role in other offices, such as through Admissions (course equivalencies and transfer credit re-evaluations) and the Global Education Office (course equivalency approval and student curriculum proposals). We are unable to provide specifics by department/college/school, as this information is not well documented.

33. **Question: E. High Priority System/Solution Functional Requirements (Page 6)** Are surveys incorporated into the existing advising process? If not, does Mason anticipate incorporating surveys?

Answer: Yes, surveys are incorporated into advising and coaching practices, with varying degrees of use by unit. Surveys are a requirement for use in the future platform. **While Mason utilizes the Qualtrics survey tool as an enterprise option for surveys, it is not integrated with any other systems at the University and there is no requirement to specifically use or integrate Qualtrics with the future platform.**

In our preliminary analysis with colleges/schools, we only came across one department that kept written notes/files. However, they may have switched to digital notes in response to the COVID-19 pandemics. In addition, several advisors take notes on paper and enter them in Navigate at a later time.

Many advisors have asked about having some way of getting information from the student at the time of making an appointment or before the appointment begins. We currently have no way to make a survey within the existing framework of the appointment scheduling capability in Navigate. We don’t even have a *mandatory* way for the student to note down why they are making an appointment. A survey of questions (modifiable by the advisor) that the student would answer before and/or after an appointment would be a welcome feature for advisors. The important part of this feature would be that the survey would have to be integrally linked into the student record, and not independent of the system (like FORMS is now) that would require the advisor to import that form into the student record.

It is Mason's intention to incorporate the ability to perform integrated assessments as soon as is feasible, providing greater visibility into the full student lifecycle. We see the ability to utilize surveys more purposefully as contributing this objective.

34. Question: E. High Priority System/Solution Functional Requirements (Page 6) What are the Degree Audit systems that would need to be integrated?

Answer: See answers to Question 12 and Question 13. Currently, Mason uses DegreeWorks as its degree audit system.

35. Question: E. High Priority System/Solution Functional Requirements (Page 6) Referring to Section 3-e. Integration, which systems does "and relevant Mason systems" refer to?

Answer: See answers to Question 12 and Question 13. Additional systems could be identified at some point in the future. However, a determination would need to be made, inclusive of input from the selected vendor, about the feasibility of integration for any additional systems identified.

36. Question: E. High Priority System/Solution Functional Requirements (Page 6) Does the solution or system need to be integrated with additional external systems that may not be enterprise-wide? Please provide additional detail on any systems not currently integrated that should be in-scope for data flow to support advising, alerts, planning, communications and engagement, or reporting and analytics.

Answer: See answers to Question 12 and Question 13. Additional systems could be identified at some point in the future, after considering the feasibility of integration.

37. Question: E. High Priority System/Solution Functional Requirements (Page 6) Do you have a storage solution for the video recordings?

Answer: Mason does not have a permanent storage solution for video recordings. Recordings are currently performed and stored by a third-party vendor currently under contract to provide specialized coach training and quality assurance services for the Mason Care Network student success coaching unit (uCoach by InsideTrack - <https://www.insidetrack.org/>). Mason will need to perform and store recordings as part of our planned transition to train our own coaches over a two year period. Additionally, Mason's Learning Services organization uses a technology called Titanium to record student information, which will likely need to be migrated into or shared with the new system.

38. Question: E. High Priority System/Solution Functional Requirements (Page 6) What are your reporting environments now?

Answer: Reporting varies widely based on unit, but we use reporting in our current platform, Microstrategy, and DegreeWorks consistently. A point of discontent with coaches and advisors is the need to go to each individual system to run reports that in order to provide a complete and near-true view of data. If data migration or integration efforts are required to implement the future platform, it is expected that the use of multiple systems to obtain effective reporting would be reduced, and ultimately contribute to an overall strategy to eliminate duplication of effort in reporting. Mason would rely on the expertise of the selected vendor to contribute to an overall data model and/or data integration strategy.

39. **Question: Section XVIII. RFP Schedule (Page 12)** What is Mason's desired go-live date for this project/phase?

Answer: This is to be determined at a later date. We will work with the selected offeror on a project schedule/go live date upon award of a contract.

40. **Question:** What technical support is dedicated to this project (e.g., will GMU's central IT team be involved in standing up and supporting this software)?

Answer: Mason expects to have some Salesforce, data analysis and coaching/advising platform administration resources available to assist or co-manage the selected implementation, integrations, operations and maintenance. Additionally, Mason does not expect to solely manage any portion of the implementation, integration, operations and maintenance. Proposals may include multiple options for implementation, operations and maintenance. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, data model concept and recommended support model.

41. **Question:** For the goals for participation by certified MBE and WBE firms, can GMU please share if this is graded on a participation scale? Meaning if vendors show effort towards the participation goals, will they be provided a full score for this category in the evaluation criteria?

Answer: Please note that "Attachment A - The Small Business Subcontracting Plan" is separate from the Initial Evaluation Criteria. Contractors are required to complete Attachment A as part of their Offer but it is not being scored and is not part of the initial evaluation criteria. In Section XIV. Initial Evaluation Criteria and Subsequent Award the Offeror would automatically receive the five (5) points for this criterion if they are "Certified as a small, minority, or women-owned business (SWaM) with the Virginia SBSD at the proposal due date and time." If you plan on subcontracting work to a SWaM business (or teaming with a SWaM business) this would need to be outlined in the Attachment A but if the Prime Offeror, who is submitting the proposal, is a large business (or not SWaM certified by the Commonwealth of Virginia SBSD at time of proposal submission) they would not be granted the five (5) points for that evaluation criteria.

42. **Question:** As there are two incumbents providing similar services to your institution (e.g., Navigate and Salesforce), can you please describe why you are proceeding with an RFP to procure services? Are there different / new services you would like a vendor to provide?

Answer: Although Mason currently has incumbent vendors who may be able to provide similar or related goods/services, the Department has determined that the current scope, requirements, and dollar threshold have triggered the mandatory requirement for competition to award a contract that is specific to this RFP's requirements/scope. Mason reserves the right to seek competition whenever it is in the best interest of Mason and the Commonwealth of Virginia.

43. **Question:** What degree course planning tool does GMU plan to use in complement with the software under evaluation?

Answer: See answers to Question 12 and Question 13. Currently, Mason uses DegreeWorks as its degree audit system.

44. **Question:** Can you please confirm if you are willing to accept electronic signatures on forms instead of scanned hard copy files?

Answer: Yes, Mason will accept electronic signatures as long as the offeror understands that, per Commonwealth of Virginia law/policy, all electronic signatures are considered binding (and equally as valid as original/wet signatures) and that the person signing the documents/proposal has the vested authority from their organization to do so.

45. **Question:** Who has the authority to sign the proposal and how do they make decisions?

Answer: Mason cannot advise on this. Your organization should be able to advise on who in your firm has the appropriate decision making authority/responsibility and signature authority to sign your offer/proposal and any resulting contract award. If you are asking who at Mason has the authority to sign contracts or enter into agreements, that would be the Purchasing Department (depending on the dollar value of the Contract different Purchasing Officers have differing signature authorities so we cannot advise as this point who would be responsible for executing the final contract/award). If this question is asking who will be making the ultimate award decision, it will be made by the evaluation committee.

46. **Question:** Can GMU share who will be on the evaluation committee for this RFP?

Answer: No, we will not share who sits on the Committee at this time. This is to avoid the Offerors reaching out to the Committee members directly during this process. All communications should remain between the Offeror and the Primary and Secondary Procurement Officers listed at the top of the RFP.

47. **Question:** What degree audit tool does GMU plan to use in complement with the software under evaluation?

Answer: See answers to Question 12 and Question 13. Currently, Mason uses DegreeWorks as its degree audit system.

48. **Question:** Please confirm whether the services related to this RFP will be purchased with federal funds. Are the Federal Uniform Guidance Terms and Conditions included on the Solicitation General Terms and Conditions applicable?

Answer: It is Mason's intent to use University funds to procure these goods and services but it may also come to pass, in the future, that Federal funds could be used to procure goods/services under this contract. If Federal Funding is utilized the Contractor would be responsible for abiding by the Federal Uniform Guidance Terms and Conditions included in the Solicitation General Terms and Conditions. If you take issue with any of the Federal Uniform Guidance Terms and Conditions please state as such in your proposal and clearly redline/comment/provide exceptions to what issues you take with these terms

and conditions. The proposed contract award terms are outlined in the Attachment B - Sample Contract and the Data Security Addendum.

49. **Question:** Can you please confirm the Data Security Addendum is intended to be a part of this RFP as it does not seem incorporated in the Table of Contents?

Answer: Yes, the Data Security Addendum is meant to be part of this RFP. The Data Security Addendum is part of Attachment B – Sample Contract and yes, it is going to be part of the contract award. If you have any exceptions, questions, comments, etc. to either the terms and conditions of the Sample Standard Contract or the Data Security Addendum please make sure to include those as part of your offer.

50. **Question:** Regarding Question E.2.i (Intuitive student interface for search) – Can GMU clarify whether this requirement is for a student-facing search interface? Or a staff-facing search interface to identify students?

Answer: This is a requirement for a simple, intuitive search interface for both faculty, students and staff. From the faculty/staff perspective it would largely be about making their assigned advisees immediately indicated throughout usage of the system, but also a simplified way to search for items related to that specific student, such as appointments scheduled. In addition, the ability to search for a student by First Name, Last Name, Mason G Number, and Mason email should be standard in any tool we select. From the student perspective, we want searches for their advisor to be simplified, if needed at all, but additionally an intuitive interface for searching for different support processes (e.g. Career Services appointment vs. Mason Care Network Major Change Advising session). All student searches should include the option to filter by the service method (e.g. online vs. in-person vs. phone call only vs. virtual Zoom/MS Teams session).

51. **Question:** At what point in the student lifecycle does GMU assign IDs for the SIS? (e.g., upon application, admission, acceptance of admission, or matriculation)

Answer: An ID in the SIS (Banner) is called a G-Number. It is created when the application loads from the CRM to the SIS.

52. **Question:** What is the total enrollment of students anticipated to be using the solution?

Answer: All Mason undergraduates (25k+) are anticipated to have access to the system within the first year, adding graduate students over time to the system.

53. **Question:** How does GMU visualize the software being procured in this RFP integrate or complement the software being procured through GMU’s RFP for Student Course Planning, Degree Auditing and Integrated Registration System (GMU-1705-21)?

Answer: These two RFPs should be considered separately at this time. If you are offering on GMU-1705-21 please keep your proposal and any related responses separate from this RFP. RFP GMU-1705-21 has not been awarded yet and we can offer no further information at this time.

54. **Question:** As this was an “invitation to bid” can you please share which other vendors you have invited to bid.

Answer: This is not an Invitation for Bid (IFB) – where pricing is the only award factor. This is a Request for Proposal (RFP) which has multiple evaluation and award criteria.

The RFP is publicly posted and available for any vendors to offer on. It has been posted on eVA, GMU's Fiscal Website and in the Solicitation Section of the Washington Post. We also sent out a Direct Solicitation email to the following vendors: EAB, InsideTrack, Huron Consulting Group, Sierra Cedar, TargetX, Salesforce, AP Exit Group, Appirio, Ellucian, Lift Off Academics, Engage2Learn, Engage2Serve, Xello, Hobsons, WorkDay, ConexEd, RedRock, Aviso Retention, Accelera Solution, Armedia, Cloud Acceleration LLC, Code Blue Technology, Datastrong, Entecva, HyperLearn, IPA LLC, ITSI Inc, Wize Solutions, Zimpatica.

55. **Question:** If George Mason chooses a Salesforce solution, are you planning to use an existing org, or are you planning to implement it in a new org?

Answer: Unknown at this time.

56. **Question:** How many full access/administrative licenses do you anticipate needing?

Answer: See answer to Question 60.

57. **Question:** How many basic end-user licenses do you anticipate needing?

Answer: See answer to Question 60.

58. **Question:** Does Mason have an institutional data warehouse currently operating? If not, are there plans to implement one that coincide with this project?

Answer: See answer to Question 19.

59. **Question:** Does Mason have an ETL tool for use with Salesforce and other technologies on campus? If so, is the expectation that this tool will be the primary ETL for integrations within the RFP?

Answer: See answer to Question 19.

60. **Question:** How many advisors (staff, faculty, part or full-time) and coaches are expected to have access to the solution? Do they all need equal access? If not, how many need full access?

Answer: In addition to the response provided, see the answer to Question 6.

"Full access" is defined by the design of the system in use. Mason is not able to specify or define what "full access" is for an unknown, future solution. Multiple roles exist with varying degrees of access for Advisors, Faculty, Athletics, Administrators, and peers. Each is customized for their specific needs, giving them only the permissions they use daily. It is important that a future solution will also have the capability to for varying permission levels.

It is impossible to estimate how many users will be given "full access" until a system has been determined and capability is assessed.

61. **Question:** Does the Implementer have to be preapproved or through their response to this RFP gain approval for work at Mason?

Answer: See Answer to Question 3. Above.

62. **Question:** Will Mason allow separate contracts for software and services in response to this RFP?

Answer: See Answer to Question 1. Above.

63. **Question:** Is this solution for just Undergrad or does it include Grad and Online?
Answer: See Answer to Question 10. Above.
64. **Question:** Does GMU have a list of preferred implementation partners?
Answer: See Answer to Question 2. Above.
65. **Question:** Aside from EAB Navigate, what other solutions or technologies are currently supporting coaching/advising efforts on campus?
Answer: See Answer to Question 12. Above.
66. **Question:** Is the intention to have a single advising/coaching solution across Mason?
Answer: See Answer to Question 5. Above.
67. **Question:** What are your reporting environments now?
Answer: See Answer to Question 38. Above.
68. **Question:** Will students in the NOVA partnership program, ADVANCE, have access to services that will be recorded in the Advising system?
Answer: See answer to Question 14, 16 and 37.
69. **Question:** Will advisors/coaching staff at NOVA have or need access to the advising solution under a separate security role? Or will the solution ONLY be accessed by GMU representatives?
Answer: See answer to Question 14, 16 and 37.
70. **Question:** Will the proposed solution require integration with EAB Navigate?
Answer: See Answer to Question 13. Above.
71. **Question:** What is the degree audit system that will be integrated with the proposed solution?
Answer: See Answer to Question 34. Above
72. **Question:** Which CampusGroups functionality is currently leveraged for student engagement?
Answer: The following CampusGroups functionality is currently being leveraged for student engagement (<https://campusgroups.com/product/product/>):
- Consistently Used
- Groups & Membership - to manage organizations and joining of groups, student leaders & offices to communicate, post events, register for events, complete forms/polls/elections/surveys, etc.
 - Email Marketing - not incorporated yet, but hope to in the future
 - Events Management – separate roles for student organization officers vs students
 - Student Dashboard - student profiles (can connect their social media accounts, etc.)
 - Forms, Surveys & Polls - approval processes, events managements, workflows
 - Chat - also used in conjunction with small groups for orientation to connect with orientation leaders
 - Dedicated Campus App/Mobile App
- Inconsistent or Restricted Use
- Virtual Student Fair - used approximately 3-4 times so far (virtual involvement fair)
 - Campus-Wide Directory - inconsistently used, not a reliable source of information

- Tracks & Checklists - inconsistently used (mainly for The Patriot Experience co-curricular program)
- Student Dashboard - administrators
- Finance & Budgeting - restricted to student orgs for budget & payment requests
- Approval Processes - RSOs, Housing student staff
- Service Opportunities & Hours - inconsistently used by fraternities & sororities
- File sharing - RSO officers

73. **Question:** What Single Sign On (SSO) technologies would need to be integrated?

Answer: See Answer to Question 22. Above.

74. **Question:** How are text messages currently delivered for advising and coaching purposes? Is there an expectation that an existing texting technology be used?

Answer: In addition to the response provided, see the answers to Question 23 and Question 24. Text messages are delivered through our current platform and we expect to continue to use texting in our selected platform. This type of texting technology could be an important part of creating an integrated video appointment communication link. It is envisioned that the student would receive a reminder link of the upcoming appointment, and when selected, will create a visual communication link between advisor/coach and student. Also, a link to the appointment documentation so that the advisor/coach can note answers to questions asked and follow-ups needed would be incredibly useful.

75. **Question:** Is there a need for dedicated Student App (App Store / Google Play) for a more engaging student experience (i.e. - push notifications, geo-fencing, etc.)?

Answer: See Answer to Question 18. Above

76. **Question:** What types of communications are envisioned with the solution? (Email, SMS, app notification, etc.)?

Answer: See Answer to Question 29. Above.

77. **Question:** What is the email automation platform currently being used by Mason to support Coaching/Advising efforts? Is the intention to integrate or replace that system with this solution?

Answer: See answer to Question 26. There are no plans to replace the use of Outlook/365 as the email platform.

78. **Question:** Are geolocation-based communications in-scope for this project? (Ex: Student enters 500-meter radius of tutoring center and is reminded of tutoring)?

Answer: See Answer to Question 11. Above.

79. **Question:** Will individual advisors be responsible for sending post-advising follow up communications to advisees? Or should that be part of automated communications programs?

Answer: See Answer to Question 30. Above.

80. **Question:** For section XI. B. 2. C, can you please provide additional context or description for "Agility and resilience – rapid change & recovery in uncertain conditions"?

Answer: See Answer to Question 17. Above

81. **Question:** For section E.4.A - Do you have a storage solution for the video recordings?

Answer: See Answer to Question 37 above.

82. **Question:** What are you currently using Salesforce for?
Answer: Salesforce is Mason's Customer Relationship Management Software (CRM).
83. **Question:** What app exchange or managed package products are you currently using with Salesforce?
Answer: See answer to Question 9.
84. **Question:** How many new staff will need to use the coaching and advising solution to enter new data and engage with students?
Answer: See answers to Question 6 and Question 60. We are unable to predict the number of new staff that will be added to the system year after year.
85. **Question:** How many students do you expect to engage on the coaching and advising solution during the first year it is live? How many students will engage five years in?
Answer: See answers to Question 6, Question 27 and Question 52. We do not have the numbers for 5 years in the future.
86. **Question:** How many times per month do you expect a student will login to the coaching and advising solution?
Answer: See answers to Question 6, Question 27 and Question 52.
87. **Question:** Are you interested in receiving a proposal that breaks an implementation into phases to take into account change management for staff and technical dependencies for your IT team?
Answer: Yes. Per the proposal submission requirements, proposals must include an implementation and release plan that covers up to 3 years of time.
88. **Question:** Are you looking for self-service features like knowledge/faq articles, chat bots, etc?
Answer: Yes. Please refer to the answer for Question 20. Chat bots are not a requirement. Though, vendors are welcome to propose chat bots or other options that would enable a more engaging student experience. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, and a recommended support model.
89. **Question:** Is GMU interested in a mobile application and a website, which work together, for their solution or would they rather just a mobile application or website?
Answer: Mason will review proposals that include either or both options, assuming all proposal submission requirements are met. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, and a recommended support model.
90. **Question:** Is GMU open to a completely custom build on a mobile app and/or website?
Answer: GMU has no preference regarding "off the shelf" versus custom built solutions/systems/software. However, the vendor's proposed solution must be able to meet GMU's requirements regardless of type and please note that Price, while not the only evaluation factor, is one of the factors being evaluated/considered. Please also refer to proposal submission requirements regarding inclusion of an implementation and release plan, and a recommended support model.
91. **Question:** Does GMU prefer an 'off the shelf' solution for either a mobile app and/or website?

Answer: See Answer to Question 90. Above.

Please sign and include this addendum as part of your offer.

In Compliance With this RFP And To All The Conditions Imposed Therein And Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services required by this RFP at the prices indicated in the pricing schedule, and the undersigned hereby certifies that all information provided below and in any schedule hereto is true, correct, and complete.

Name and Address of Firm:

Date: _____

By: _____

Title: _____

Fed ID No: _____

Signature: _____

Email: _____

Phone: _____

Sincerely,
Katherine Sirotin
Assistant Director, Purchasing (VCO, CUPO)
Purchasing Department
George Mason University