OSU
Oregon State
UNIVERSITY

REQUEST FOR PROPOSAL
No. WY162119P

Student Engagement Management System

<u>PROPOSAL DUE DATE AND TIME:</u>
February 21, 2013 (3:00 PM, PST)

OSU Procurement and Contract Services Offices are open from 8:00 am – 12:00 noon and 1:00 pm – 5:00 pm.
Offices are closed during the 12:00 noon – 1:00 pm lunch hour.

<u>SUBMITTAL LOCATION:</u>

Oregon State University
Procurement and Contract Services
644 SW 13th Avenue
Corvallis, Oregon 97333

1.0 GENERAL

1.01 SCHEDULE OF EVENTS:
▪ Request for Proposal Issue Date ....January 09, 2013
▪ Deadline for Request for Clarification or Change ....January 31, 2013 (3:00 pm, PST)
▪ Proposal Due Date and Time ....February 21, 2013 (3:00 pm, PST)

This Schedule of Events is subject to change. Any changes will be made through the issuance of Written Addenda.

1.02 PRE-PROPOSAL CONFERENCE:
A Pre-Proposal Conference will not be held.

1.03 ISSUING OFFICE:
The Procurement and Contract Services (PaCS) department of Oregon State University (OSU) is the issuing office and is the sole point of contact for this Request for Proposal. Address all concerns or questions regarding this Request for Proposal to the Administrative Contact identified below:

1.04 ADMINISTRATIVE CONTACT:
Name:	Will Young
Title:	Procurement Analyst
Telephone:	(541) 737-3572
Fax:	(541) 737-5546
E-Mail:	will.young@oregonstate.edu

1.05 DEFINITIONS:
As used in this Request for Proposal, the terms set forth below are defined as follows:
  a. "Addenda" means an addition to, deletion from, a material change in, or general interest explanation of the Request for Proposal.
  b. "Exhibits" means those documents which are attached to and incorporated as part of the Request for Proposal.
  c. "Proposal" means an offer, binding on the Proposer and submitted in response to a Request for Proposal.
  d. "Proposer" means an entity that submits a Proposal in response to a Request for Proposal.
  e. "Proposal Due Date and Time" means the date and time specified in the Request for Proposal as the deadline for submitting Proposals.
  f. "Request for Proposal" (RFP) means a Solicitation Document to obtain Written, competitive Proposals to be used as a basis for making an acquisition or entering into a Contract when price will not necessarily be the predominant award criteria.
  g. "Responsible" means an entity that demonstrates their ability to perform satisfactorily under a Contract by meeting the applicable standards of responsibility outlined in OAR 580-061-0130.
  h. "Responsive" means a Proposal that has substantially complied in all material respects with the criteria outlined in the Request for Proposal.
  i. "Written or Writing" means letters, characters, and symbols inscribed on paper by hand, print, type, or other method of impression intended to represent or convey particular ideas or meanings.

2.0   INTRODUCTION AND BACKGROUND

2.01   INTRODUCTION
Oregon State University (OSU) Procurement and Contract Services (PaCS) is seeking Responsive Responsible Proposers to submit Proposals for a comprehensive, highly customizable management system for tracking and reporting on student engagement and student organization management. With a focus on work-flow efficiency, a centralized data hub must interface with various, uniquely developed modules with accessible, multi-user interface. Initially, OSU needs a Co-Curricular Transcription/Data collection Hub with three (3) core modules developed, a Student Organization Management module, a Service Learning/Civic Engagement module, and a Co-Curricular Learning module.

2.02   BACKGROUND:
The Office of the Vice Provost for Student Affairs oversees the departments and offices that comprise the Division of Student Affairs. The division provides essential leadership for the out-of-classroom education of students, the co-curriculum which complements and supplements the academic areas, and the various services necessary for successful retention and graduation. Units within the division have a staff of approximately 125 academic and non-academic faculty, 350 classified and 1,000 student employees.

Over time it is likely all units in the Division of Student Affairs will engage with the Student Engagement Management System in some way. All of these units provide education and training of students to function as paraprofessionals in offices/programs as well as working with students as participants in the programs/offerings. Units/Departments in the Division of Student Affairs include:

Office of Admissions — responsible for admission process, recruiting new students
Office of the Registrar — provides maintenance of integrity of the academic record
Office of Financial Aid and Scholarships — administers financial aid and scholarship programs
Recreational Sports — provides education and opportunities for students and others to engage in and learn about recreational activities and health
Student Health Center — provides medical and educational services to students for health
Counseling and Psychological Services — provides services focused on mental and emotional health and well-being
Student Leadership and Involvement (includes Greek Life) — provides advising and opportunities for student engagement in clubs, organizations, and leadership opportunities
Memorial Union — provides programs and services related to a place of service, entertainment, and learning
Housing and Dining Services — provides safe housing and food options for students along with education around community and academic success
Intercultural Student Services — provides services to under-represented students related to community and academic success
Career Services — provides education and opportunities to interact with employers, pursue careers, explore career options, etc.
Student Media — provides students opportunities to learn and produce media (print, radio, television, etc.) for the public
Office of the Dean of Student life — provides educational and developmental opportunities for students to make informed decisions that support their success at OSU
Disability Access Services — provides services and programs related to educational access for people with disabilities
Student Conduct and Community Standards — provides services and programs that educate students about appropriate behavior in and out of the classroom
New Student Programs and Family Outreach — provides transitional services to aid students and families coming into relationship with the university
Pre-college programs — provides services and programs to students prior to college

For a long time some departments within the Division of Student Affairs have utilized many, varying systems for management and reporting of student involvement on campus. These systems no longer meet the needs of our community. Other departments and programs have not had a software solution and are looking to develop or create something that meets their programmatic needs. Further it is important that the elements of the software are linked so that centralized data analysis and reporting can be accomplished as well as individual unit data analysis and reporting. The division is looking a software system that:

1. Allows departments/programs to effectively and efficiently track student involvement in their unique and diverse program offerings
2. Allows for relational database of student information that is usable across multiple departments
3. Facilitates assessment and documentation of co-curricular learning
4. Provides a comprehensive student engagement management system which includes event and activity reporting, annual registration, risk-management tools, etc.
5. Streamlines work-flow

Along with a Co-Curricular Transcription/Data collection Hub, OSU has identified three (3) core modules to be developed, a Student Organization Management module, a Service Learning/Civic Engagement module, and a Co-Curricular Learning module. OSU expects these modules to be developed in phases, with the phases indicating the priority of development as follows:

1. Phase 1 - Co-Curricular Transcription/Data Collection Hub and Student Organization Management module
2. Phase 2 - Service Learning/Civic Engagement module
3. Phase 3 - Co-Curricular Learning module

OSU's preference is for Proposers to price each phase separately. OSU reserves the right to purchase only some of the modules in the Proposal.

2.03   OREGON STATE UNIVERSITY:
Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is a member of the Oregon University System and one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only Oregon institution to hold the Carnegie Foundation's top ranking for research universities, a recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in almost every one of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, masters and doctoral degrees through 12 academic colleges enrolling more than 20,000 students from every county in Oregon, every state in the country and more than 90 nations.

3.0   SPECIFICATIONS

3.01   SPECIFICATIONS:
Describe how your proposed Student Engagement Management System will meet the specifications referenced in Exhibit D.

3.03   TERMS AND CONDITIONS:
OSU's terms and conditions governing the purchase resulting from this RFP are included at Exhibit A. OSU will negotiate the resulting Contract to be consistent with the solution chosen.

| 4.0 | PROPOSER QUALIFICATIONS |

4.01   MINIMUM QUALIFICATIONS:
In order to qualify as a Responsive Proposer, the Proposer needs to meet the minimum qualifications below. After verification that the minimum qualifications have been met, OSU will award points based on the level of the Proposer's qualifications.

a. Experience in working with institution of higher education or other complex organizations
b. Experience developing software that manages and protects sensitive/confidential data
c. Demonstrated experience in developing software that enhances work-flow effectiveness and efficiency
d. Experience providing customer service for a diverse user-base
e. Experience providing technical support services, trouble-shooting, development and maintenance for databases integrated into an online solution

4.02   PREFERRED QUALIFICATIONS:
OSU will award additional points for Proposers able to meet the preferred qualifications below.

a. Experience working with student organization management
b. Experience with tracking and reporting of student learning and engagement

| 5.0 | REQUIRED SUBMITTALS |

5.01   QUANTITY OF PROPOSAL:
Submit one (1) original Proposal and seven (7) duplicate copies. Mark original Proposal as "ORIGINAL". Original should contain original signatures on any pages where a signature is required. Proposals should contain the submittals listed in this section below:

5.02   REQUIRED SUBMITTALS:
It is the Proposer's sole responsibility to submit information in fulfillment of the requirements of this Request for Proposal. If pertinent information or required submittals are not included within the Proposal, it may cause the Proposal to be rejected or have an adverse impact on evaluation.

Proposers should submit the following information:
- Description of how the goods or services offered specifically meet the specifications described in section 3.
- Detailed information about how the Proposer meets the minimum and preferred qualifications detailed in section 4.
- Detailed project implementation plan for phases 1 through 3 including timeline and plans for working with OSU during design and development and throughout implementation.
- Complete and itemized pricing of the goods or services requested.
  - Include pricing by project phases.
  - Include pricing for initial development and separate pricing for ongoing maintenance and support.
  - Include a service pricing structure for future changes, modifications and new modules over time.
- Description of the service levels to which Proposer will commit. Include information on:
  - Problem resolution timelines.
  - Processes for updates and bug fixes.
  - Data security and backup.
  - Availability of software escrow.
- Proposer's contract form. Contract will be negotiated to be consistent with OSU's terms and conditions detailed in section 3. If a standard contract form is not used, indicate this in your Proposal.
- Exhibit B, Certifications, fully completed.
- Exhibit C, References, fully completed.

6.0	EVALUATION AND AWARD

6.01   EVALUATION:
The stages of review and evaluation are as follows:

a. Determination of Responsiveness:
    OSU will first review all Proposals to determine Responsiveness. Proposals that do not comply with the instructions or are incomplete may be deemed non-Responsive. Written notice will be sent to Proposers whose Proposal is deemed non-Responsive identifying the reason. A proposer has the right to appeal the decision pursuant to OAR 580-061-130(5)(a).

b. First Stage Evaluation:
    Those Proposals determined to be Responsive will be evaluated using the required submittals. Proposals will be scored based on the evaluation criteria listed below in section 6.03. Scores will be used to determine Proposer's within a competitive range. The competitive range will be made of Proposers whose individual scores, when viewed together, form a group of the highest ranked Proposers above a natural break in the scores.

    OSU may award after the first stage evaluation to the highest ranked Proposer without moving on to the second stage evaluation. If this option is selected, Written notice of intent to award the Contract to the highest ranked Proposer will be provided to all Responsive Proposers.

c. Second Stage Evaluation:
    If award is not made after the first stage evaluation, OSU may choose any of the following methods in which to proceed:

    i.   Issue a Written invitation to Proposers within the competitive range requesting an interview, presentation, site visit or any other evaluative method that is relevant to the goods or services solicited in the Request for Proposal. Written invitations will contain the evaluation criteria and scoring that will be used by the evaluation committee.

    ii. Engage in oral or Written discussions with and receive best and final Proposals from all Proposers in the Competitive Range or all Proposers submitting Responsive Proposals. Discussions may be conducted for the following purposes:
         ▪ Informing Proposers of deficiencies in their initial Proposals;
         ▪ Notifying Proposers of parts of their Proposals for which OSU would like additional information; or
         ▪ Otherwise allowing Proposers to develop revised Proposals that will allow OSU to obtain the best Proposal based on the requirements set forth in this Request for Proposal.

         The conditions, terms, or price of the Proposal may be altered or otherwise changed during the course of the discussions provided the changes are within the scope of the Request for Proposal. Best and final Proposals will be scored based on the evaluation criteria listed below in section 6.03.

    Points awarded in the first stage evaluation will not be carried to the second stage evaluation. Contract will be awarded to the Proposer who in OSU's opinion, best meets the requirements and qualifications of the RFP and OSU's needs.

d. Additional Stages of Evaluation:
    If after completion of the second stage of evaluation, an award is not made, OSU may add another stage of evaluation using any of the methods outlined in the second stage evaluation above.

6.02   NEGOTIATIONS:
OSU may commence serial negotiations with the highest-ranked Proposer or commence simultaneous negotiations with all eligible Proposers. OSU may negotiate:

a. The statement of work;
b. The Contract price as it is affected by negotiating the statement of work; and
c. Any other terms and conditions determined by OSU in its sole discretion to be reasonably related to those expressly authorized for negotiation. Accordingly, Proposers will not submit and OSU will not accept for negotiation, any alternative terms and conditions that are not reasonably related to those expressly authorized for negotiation.

Terms and conditions within the sample contract that are unrelated to the statement of work or Contract price may be negotiated after award, but before legal sufficiency review or execution of the Contract.

6.03   EVALUATION CRITERIA:
Points will be given in each criteria and a total score will be determined. The maximum points available for each criteria are identified below.

Evaluation Criteria:	Points:
Proposal relative to the mandatory Specifications	30
Proposal relative to the preferred Specifications	20
Proposers qualifications relative to the minimum qualifications	15
Proposers qualifications relative to the preferred qualifications	5
Price of the goods or services	30
Total	**100**

6.04   INVESTIGATION OF REFERENCES:
OSU reserves the right to investigate and to consider the references and the past performance of any Proposer with respect to such things as its performance or provision of similar goods or services, compliance with specifications and contractual obligations, and its lawful payment of suppliers, subcontractors, and workers. OSU further reserves the right to consider past performance, historical information and facts, whether gained from the Proposal, Proposer interviews, references, OSU or any other source in the evaluation process. OSU may postpone the award or execution of the Contract after the announcement of the notice of intent to award in order to complete its investigation.

7.0   INSTRUCTIONS TO PROPOSERS

7.01   APPLICABLE STATUTES AND RULES:
This RFP is subject to the applicable provisions and requirements of the Oregon Revised Statutes, Oregon Administrative Rules, and OSU Policies and Procedures.

7.02   REQUEST FOR CLARIFICATION OR CHANGE:
Requests for clarification or change of the Request for Proposal must be in Writing and received by the Administrative Contact no later than the Deadline for Request for Clarification or Change as specified in the Schedule of Events. Such requests for clarification or change must include the reason for the Proposer's request. OSU will consider all timely requests and, if acceptable to OSU, amend the Request for Proposal by issuing an Addendum. Envelopes, e-mails or faxes containing requests should be clearly marked as a Request for Clarification or Change and include the RFP Number and Title.

7.03   ADDENDA:
Only documents issued as Written Addenda by PaCS serve to change the Request for Proposal in any way. No other direction received by the Proposer, written or verbal, serves to change the Request for Proposal. PaCS will notify potential Proposers through publication of the Addenda on the OUS procurement website. If you have received a Request for Proposal you should consult the OUS procurement website, prior to Proposal submittal, to assure that you have not missed any Addenda. Proposers are not required to return Addenda with their Proposal. However, Proposers are responsible for obtaining and incorporating any changes made by the Addendum into their Proposal. Failure to do so may, in effect, make the Proposal non-Responsive, which may cause the Proposal to be rejected.

7.04   PREPARATION AND SIGNATURE:
All Required Submittals must be Written or prepared in ink and signed in ink by an authorized representative with authority to bind the Proposer. Signature certifies that the Proposer has read, fully understands, and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal.

7.05   PUBLIC RECORD:
Upon completion of the Request for Proposal process, information in your Proposal will become subject records under the Oregon Public Records Law. Only those items considered a "trade secret" under ORS 192.501(2), may be exempt from disclosure. If a Proposal contains what the Proposer considers a "trade secret" the Proposer must mark each sheet of information as such. Only bona fide trade secrets may be exempt and only if public interest does not require disclosure.

7.06   SUBMISSION:
Proposals must be submitted in a sealed envelope and be delivered to the submittal location listed on the Request for Proposal cover sheet no later than the Proposal Due Date and Time. Proposer must specify on the outside of the envelope the Request for Proposal number, the Request for Proposal title and the Proposal Due Date and Time. **E-MAIL OR FACSIMILE PROPOSALS WILL NOT BE ACCEPTED.**

7.07   MODIFICATION:
Prior to submittal, Proposers should initial modifications or erasures in ink by the person signing the Proposal. After submittal but prior to the Proposal Due Date and Time, Proposals may be modified by submitting a Written notice indicating the modifications and a statement that the modification amends and supersedes the prior Proposal. After the Proposal Due Date and Time, Proposers may not modify their Proposal.

7.08   WITHDRAWALS:
A Proposer may withdraw their Proposal by submitting a Written notice to the Administrative Contact identified in this Request for Proposal prior to the Proposal Due Date and Time. The Written notice must be on the Proposer's letterhead and signed by an authorized representative of the Proposer. The Proposer, or authorized representative of the Proposer, may also withdraw their Proposal in person prior to the Proposal Due Date and Time, upon presentation of appropriate identification and evidence of authority to withdraw the Proposal satisfactory to OSU.

7.09   LATE SUBMITTALS:
Proposals and Written notices of modification or withdrawal must be received no later than the Proposal Due Date and Time. OSU may not accept or consider late Proposals, modifications, or withdrawals except as permitted in OAR 580-061-0120.

7.10   PROPOSAL OPENING:
Proposals will be opened immediately following the Proposal Due Date and Time at the Submittal Location. Proposer may attend the Proposal opening. Only the names of the Proposers submitting Proposals will be announced. No other information regarding the content of the Proposals will be available.

7.11   PROPOSALS ARE OFFERS:
The Proposal is the Proposer's offer to enter into a Contract pursuant to the terms and conditions specified in the Request for Proposal, its Exhibits, and Addenda. The offer is binding on the Proposer for one hundred twenty (120) days. OSU's award of the Contract constitutes acceptance of the offer and binds the Proposer. The Proposal must be a complete offer and fully Responsive to the Request for Proposal.

7.12   CONTINGENT PROPOSALS:
Proposer shall not make its Proposal contingent upon OSU's acceptance of specifications or contract terms that conflict with or are in addition to those in the Request for Proposal, its Exhibits, or Addenda.

7.13   RIGHT TO REJECT:
OSU may reject, in whole or in part, any Proposal not in compliance with the Request for Proposal, Exhibits, or Addenda, if upon OSU's Written finding that it is in the public interest to do so. OSU may reject all Proposals for good cause, if upon OSU's Written finding that it is in the public interest to do so. Notification of rejection of all Proposals, along with the good cause justification and finding of public interest, will be sent to all who submitted a Proposal.

7.14   AWARDS:
OSU reserves the right to make award(s) by individual item, group of items, all or none, or any combination thereof. OSU reserves the right to delete any item from the award when deemed to be in the best interest of OSU.

7.15   LEGAL SUFFICIENCY REVIEW:
Prior to execution of any Contract resulting from this Request for Proposal, the Contract may be reviewed for legal sufficiency by a qualified attorney for OSU pursuant to the applicable Oregon Revised Statutes and Oregon Administrative Rules. Legal sufficiency review may result in changes to the terms and conditions specified in the Request for Proposal, Exhibits, and Addenda.

7.16   PROPOSAL RESULTS:
A notice of intent to award containing the Proposal results will be issued to all Proposers. The Proposal file will be available for Proposer's review during the protest period at the PaCS Department. Proposers must make an appointment with the Administrative Contact to view the Proposal file. After the protest period, the file will be available by making a Public Records Request to OSU.

7.17   PROPOSAL PREPARATION COST:
OSU is not liable for costs incurred by the Proposer during the Request for Proposal process.

7.18   PROPOSAL CANCELLATION:
If a Request for Proposal is cancelled prior to the Proposal Due Date and Time, all Proposals that may have already been received will be returned to the Proposers. If a Request for Proposal is cancelled after the Proposal Due Date and Time or all Proposals are rejected, the Proposals received will be retained and become part of OSU's permanent Proposal file.

7.19   PROTEST OF CONTRACTOR SELECTION, CONTRACT AWARD:
Any Proposer who feels adversely affected or aggrieved may submit a protest within seven (7) calendar days after OSU issues a notice of intent to award a Contract. The protest must be clearly identified as a protest, identify the type and nature of the protest, and include the Request for Proposal number and title. The rules governing protests are at OAR 580-061-0145.

EXHIBIT A
TERMS AND CONDITIONS / SAMPLE CONTRACT

[Remainder of this page left intentionally blank]

OREGON STATE UNIVERSITY
STANDARD TERMS AND CONDITIONS FOR SERVICES

These Standard Terms and Conditions for Services shall govern the purchase by OSU from the Contractor and shall replace and supersede any terms and conditions presented by Contractor or any sales quotations, order acknowledgements, or similar forms unless otherwise specified in the Solicitation Documents or on the face of the Purchase Order issued by OSU.

1. DEFINITIONS:
As used in this Contract, the terms set forth below are defined as follows:
   a. "Contract" means only the documents listed below, which, in the event of any conflicts among them, must be interpreted in the following order of precedence:
      i. The Solicitation Document and its Attachments and Addenda, if any; and
      ii. The Purchase Order Issued by OSU
   b. "Contractor" means a person or organization with whom OSU has contracted for the provision of services pursuant to this Contract;
   c. "Contractor Intellectual Property" means any intellectual property owned by Contractor and developed independently from Contractor's performance of this Contract;
   d. "OAR" means the Oregon Administrative Rules;
   e. "ORS" means the Oregon Revised Statutes;
   f. "OSU" means the State of Oregon, acting by and through the State Board of Higher Education, on behalf of Oregon State University.
   g. "Solicitation Document" means the Request for Quotes, Invitation to Bid, Request for Proposals, or any other written document issued by OSU that outlines the required specifications necessary to submit a responsive quote, bid, proposal, or any other response;

2. ACCEPTANCE OF SERVICES:
Services furnished under this Contract are subject to acceptance by OSU. If OSU finds services furnished to be incomplete or not in compliance with the Contract, OSU, at its sole discretion, may either reject the services, require Contractor to correct any defects without charge, or negotiate with Contractor to reduce the price, whichever OSU deems appropriate under the circumstances. If Contractor is unable or refuses to cure any defects within a time deemed reasonable by OSU, OSU may reject the services and cancel the Contract in whole or in part.

3. ACCESS TO RECORDS:
Contractor shall maintain books, records, documents, and other evidence and accounting procedures and practices sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. OSU, the Oregon State Board of Higher Education, Oregon Secretary of State, federal government, and their duly authorized representatives shall have access to the books, documents, papers, and records of Contractor which are directly pertinent to this Contract for the purpose of making audit, examination, excerpts, and transcripts. Contractor shall maintain such books and records for OSU's review for at least six years beyond the Term of the Contract unless OSU authorizes a shorter period in writing. Contractor shall promptly remedy any discrepancies involving deviation from the terms of this Contract and shall promptly reimburse OSU for any commitments or expenditures found by OSU to have been in excess of amounts authorized by OSU.

4. AFFIRMATIVE ACTION:
Pursuant to OAR 580-061-0030, Contractor certifies that Contractor has not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts.

5. APPLICABLE LAW; JURISDICTION AND VENUE.
   a. This Contract is governed and shall be construed in accordance with the laws of the State of Oregon, without resort to any other jurisdiction's conflict of law rules or doctrines. Any claim, action, or suit between OSU and Contractor that arises out of or relates to performance of this Contract must be brought and conducted solely and exclusively within the Circuit Court for Marion County, for the State of Oregon.
   b. Notwithstanding the foregoing paragraph, if a claim must be brought in federal forum, it must be brought and adjudicated solely and exclusively in the United States District Court for the District of Oregon. This paragraph applies to a claim brought against OSU only to the extent Congress has validly abrogated OSU's sovereign immunity and is not consent by OSU to be sued in federal court. This paragraph is also not a waiver by OSU of any form of immunity, including without limitation sovereign immunity and immunity based on the Eleventh Amendment to the United States Constitution.
   c. Except as set forth in the paragraph above, the parties consent to in personam jurisdiction in the above courts and waive any objection to venue and any objection that the forum is inconvenient.

6. ASSIGNMENT/SUBCONTRACT/SUCCESSORS:
Contractor shall not assign, sell, transfer, or subcontract rights, or delegate responsibilities under this Contract, in whole or in part, without the prior written approval of the OSU Procurement and Contract Services Department, and any attempt by Contractor to assign, sell, transfer, or subcontract rights or delegate responsibilities under this Contract, without first acquiring written approval of the OSU Procurement and Contract Services Department, is void. No such written approval from OSU relieves Contractor of any obligations of this Contract, however, and any assignee, new owner, transferee or subcontractor will be considered an agent of Contractor. Contractor shall remain liable to OSU under the Contract as if no such assignment, sale, transfer, or subcontract had occurred. The provisions of this Contract are binding upon and will inure to the benefit of the parties to the Contract and their respective permitted successors and assigns.

7. COMPLIANCE WITH APPLICABLE LAW:
The parties shall at all times comply with all federal, state and local laws, regulations, executive orders and ordinances pertaining to their respective businesses, products or services, employment obligations, and the subject matter of this Contract. Without limiting the generality of the foregoing, Contractor expressly agrees to comply with the following laws, regulations and executive orders to the extent they are applicable to the Contract: (i) Titles VI and VII of the Civil Rights Act of 1964, as amended; (ii) Paragraphs 503 and 504 of the Rehabilitation Act of 1973, as amended; (iii) the Americans with Disabilities Act of 1990, as amended; (iv) Executive Order 11246, as amended; (v) the Health Insurance Portability and Accountability Act of 1996; (vi) the Age Discrimination in Employment Act of 1967, as amended, and the Age Discrimination Act of 1975, as amended; (vii) the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended; (viii) ORS Chapter 659, as amended; (ix) all regulations and administrative rules established pursuant to the foregoing laws; and (x) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations. These laws, regulations and executive orders are incorporated by reference herein to the extent that they are applicable to the Contract and required by law to be so incorporated.

8. CONFIDENTIALITY:
This Contract is subject to the limitations and conditions of the Oregon Public Records Law, ORS 192.410-192.505.

9. EXPORT CONTROL:

Contractor acknowledges that OSU has students and faculty who are foreign nationals who may work with the services, product or technology received from Contractor pursuant to this Contract. Contractor represents that it has informed OSU in writing, prior to executing this Contract if it is providing OSU any product or technology subject to the U.S. Export Administration Act of 1979, the Export Administration Regulations and the International Traffic in Arms Regulations, and if so, under what Commerce Control List number(s) or U.S. Munitions List number(s) it is controlled.

10. FORCE MAJEURE:

Neither OSU nor Contractor shall be held responsible for delay or default caused by fire, riot, act of nature, terrorist acts, or other acts of political sabotage, or war where such cause was beyond, respectively, OSU's or Contractor's reasonable control. Contractor shall make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon cessation of the cause, diligently pursue performance of its obligations under this Contract. However, if a default or delay due to a force majeure event continues for an unreasonable time, as determined by OSU, then OSU is entitled to terminate the Contract.

11. GOVERNMENT EMPLOYMENT STATUS:

Contractor certifies that it is not currently employed by the federal government and not an employee of OSU.

12. INDEMNITY, RESPONSIBILITY FOR DAMAGES:

a. Contractor shall be responsible for all damage to property, injury to persons, and loss, expense, inconvenience, and delay which may be caused by, or result from, any willful or negligent act or omission of Contractor, its subcontractors, or employees under this Contract. Contractor shall save, defend, indemnify, and hold harmless OSU, the Oregon State Board of Higher Education, the State of Oregon and their agencies, subdivisions, officers, directors, agents, members, and employees from all claims, suits, and actions resulting from or arising out of the willful or negligent acts or omissions of Contractor or its subcontractors, officers, agents, or employees acting under this Contract.

b. Without limiting the generality of this section a., Contractor expressly agrees to defend, indemnify, and hold OSU, the Oregon State Board of Higher Education, the State of Oregon and their agencies, subdivisions, officers, directors, agents, members, and employees harmless from any and all claims, suits, actions, losses, liabilities, costs, expenses and damages arising out of or related to any claims that the services or any other tangible or intangible goods delivered to OSU by Contractor that may be the subject of protection under any state or federal intellectual property law or doctrine, or OSU's use thereof infringes any patent, copyright, trade secret, trademark, trade dress, mask work, utility design, or other proprietary right of any third party; provided, that OSU shall provide Contractor with prompt written notice of any infringement claim.

c. Contractor shall have control of the defense and settlement of any claim that is subject to a. or b.; however, neither Contractor nor any attorney engaged by Contractor shall defend the claim in the name of the State of Oregon or any agency of the State of Oregon, nor purport to act as legal representative of the State of Oregon or any of its agencies, without first receiving from the Oregon Attorney General, in a form and manner determined appropriate by the Attorney General, authority to act as legal counsel for the State of Oregon, nor shall Contractor settle any claim on behalf of the State of Oregon without the approval of the Attorney General. The State of Oregon may, at its election and expense, assume its own defense and settlement in the event that the State of Oregon determines that Contractor is prohibited from defending the State of Oregon, or is not adequately defending the State of Oregon's interests, or that an important governmental principle is at issue and the State of Oregon desires to assume its own defense.

13. INDEPENDENT CONTRACTOR STATUS:

The services to be rendered under this Contract are those of an independent contractor. OSU reserves the right (a) to determine and modify the delivery schedule for the services and (b) to evaluate the quality of the services; however, OSU may not and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the services. Contractor is not an officer, employee or agent of OSU as those terms are used in ORS 30.265.

14. INSURANCE:

Contractor shall secure at its own expense and keep in effect during the term of this Contract general liability or professional liability insurance as deemed applicable by OSU with limits of not less than four million dollars ($4,000,000) aggregate, unless otherwise specified in writing by OSU. Insurance policies are to be issued by an insurance company authorized to do business in the State of Oregon with a rating of A or better, or as deemed acceptable by OSU. If requested, Contractor shall provide proof of insurance of said insurance policy. If any of the liability insurance is arranged on a "claims made" basis, "tail" coverage will be required at the completion of this Contract for a duration commiserate with the statute of limitations for tort claims in Oregon.

15. INVOICES AND PAYMENT TO CONTRACTOR:

Contractor shall send invoices to OSU for services accepted by OSU to OSU's Department at the address specified in the Purchase Order. Contractor shall include in each invoice:

a. The Purchase Order number;
b. The quantity of goods ordered, the quantity of goods delivered, the date goods were delivered, the price per unit;
c. A detailed description of any services performed, the dates services were performed, the rate or rates for services performed, and the total cost of services; and
d. The total amount due and the payment address.

OSU shall pay Contractor for services performed at the prices and rates specified herein. Contractor shall look solely to OSU for payment of all amounts OSU owes to Contractor. Payment of OSU contracts is normally made within 30-45 days following the date the the invoice is received. After 45 days, Contractor may assess overdue account charges up to a maximum of two-thirds of one percent (2/3 of 1%) per month or eight percent (8%) per annum on the outstanding balance (ORS 293.462).

16. NOTICE:

Unless otherwise specified, any notice pursuant to this Contract shall be validly given if in writing and given to the other party, via e-mail, fax, or by registered or certified mail, postage prepaid, to the respective addressees of Contractor and OSU.

17. ORIGINAL WORKS:

All inventions, discoveries, work of authorship, trade secrets or other tangible or intangible items and intellectual property rights created by Contractor pursuant to this Contract, including derivative works and compilations, together the "Work Product", and whether or not such Work Product is considered a work made for hire or an employment to invent, shall be the exclusive property of OSU. OSU and Contractor agree that such original works of authorship are "work made for hire" of which OSU is the author within the meaning of the United States Copyright Act. If for any reason the original Work Product created pursuant to this Contract is not "work made for hire," Contractor hereby irrevocably assigns to OSU any and all of its rights, title, and interest in all original Work Product created pursuant to this Contract, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual

property law or doctrine. Upon OSU's reasonable request, Contractor shall execute such further documents and instruments necessary to fully vest such rights in OSU. Contractor forever waives any and all rights relating to original Work Product created pursuant to this Contract, including without limitation, any and all rights arising under 17 USC §106A or any other rights of identification of authorship or rights of approval, restriction or limitation on use or subsequent modifications.

In the event that Work Product created by Contractor under this Contract is a derivative work based on Contractor intellectual property, or is a compilation that includes Contractor intellectual property, Contractor hereby grants to OSU an irrevocable, non-exclusive, perpetual, royalty-free license to use, reproduce, prepare derivative works based upon, distribute copies of, perform and display the pre-existing elements of the Contractor intellectual property employed in the Work Product, and to authorize others to do the same on OSU's behalf. In the event that Work Product created by Contractor under this Contract is a derivative work based on third party intellectual property, or is a compilation that includes third party intellectual property, Contractor shall secure on OSU's behalf and in the name of OSU an irrevocable, non-exclusive, perpetual, royalty-free license to use, reproduce, prepare derivative works based upon, distribute copies of, perform and display the pre-existing elements of the third party intellectual property employed in the Work Product, and to authorize others to do the same on OSU's behalf.

18. OSU NAME AND TRADEMARK:
Contractor's shall not use names, marks or trademarks identifying OSU, or any department or office of OSU, or in any other way identify OSU without prior written approval from OSU's Office of University Advancement.

19. PARKING:
Contractors doing business on the OSU campus may be required to have a permit to park, if utilizing restricted street parking or parking lots. Contractor parking permits may be picked up from OSU's Office of Transit & Parking Services.

20. RECYCLABLE PRODUCTS:
Contractors will use recyclable products to the maximum extent economically feasible in the performance of the Contract.

21. REMEDIES FOR CONTRACTOR'S DEFAULT:
In the event Contractor is in default, OSU may, at its option, pursue any or all of the remedies available to it under this Contract and at law or in equity, including, but not limited to: (a) rejection of the services, (b) requiring Contractor to correct any defects without charge, (c) negotiation with Contractor to sell the services to OSU at a reduce price, (d) termination of the Contract, (e) withholding all moneys due for the services Contractor has failed to deliver within any scheduled completion dates or has performed inadequately or defectively, (f) initiation of an action or proceedings for damages, specific performance, or declaratory or injunctive relief, or (g) exercise of its right of set off. These remedies are cumulative to the extent the remedies are not inconsistent, and OSU may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

22. RETIREMENT SYSTEM STATUS:
Contractor is not a contributing member of the Public Employees' Retirement System and will be responsible for any federal or state taxes applicable to payment under this Contract. Contractor will not, by virtue of this Contract, be eligible for federal Social Security, employment insurance, workers' compensation or the Public Employees' Retirement System, except as a self-employed individual.

23. SAFETY AND HEALTH REQUIREMENTS/HAZARD COMMUNICATION:
Services supplied under this Contract shall comply with all federal Occupational Safety and Health Administration (OSHA) requirements and with all Oregon safety and health requirements, including those of the State of Oregon Workers' Compensation Division. Contractor shall notify OSU prior to using products containing hazardous chemicals to which OSU employees may be exposed. Products containing hazardous chemicals are those products defined by Oregon Administrative Rules, Chapter 437. Upon OSU's request, Contractor shall immediately provide Material Safety Data Sheets, as required by OAR 437-155-025, for the products subject to this provision.

24. SEVERABILITY:
The invalidity, illegality or enforceability of any provision of this Contract shall not affect the validity, legality or enforceability of any other provision of this Contract, which shall remain in full force and effect and shall be liberally construed in order to effectuate the purpose and intent of this Contract.

25. SEXUAL HARASSMENT:
The State Board of Higher Education has adopted polices applicable to Contractors that prohibit sexual harassment, and Contractor's company and employees are required to adhere to OSU's policy prohibiting sexual harassment in their interactions with members of the OSU community.

26. SURVIVAL:
The terms and conditions of this Contract that by their sense and context are intended to survive termination or expiration hereof shall so survive.

27. TAX COMPLIANCE CERTIFICATION:
Contractor certifies under penalty of perjury that Contractor is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321 and 323 and the elderly rental assistance program under ORS 310.630 to 310.706 and local taxes administered by the Department of Revenue under ORS 305.620.

28. TERMINATION:
This Contract may be terminated at any time by mutual consent of both parties or by OSU upon thirty (30) days' notice in writing and delivered by certified mail or in person to the other party. In addition, OSU may terminate this Contract at any time by written notice to Contractor if (a) Federal or state statutes, regulations or guidelines are modified or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this Contract; (b) any license or certificate required by law or regulation to be held by the Contractor to provide the services required by this Contract is for any reason denied, revoked, or not renewed; or (c) OSU fails to receive sufficient legislative appropriations (or from applicable federal, state, or other sources) to permit OSU, in the exercise of its reasonable administrative discretion, to fulfill its obligations under this Contract, or if the OSU program for which this Contract was executed is abolished. This Contract may also be terminated by OSU for default (including breach of contract) if (a) Contractor fails to timely provide services or materials called for by this Contract; or (b) Contractor fails to perform any of the other provisions of this Contract, or so fails to pursue the work as to endanger performance of this Contract in accordance with its terms and conditions, and after receipt of written notice from OSU, fails to correct such failures within ten (10) days. The rights and remedies of OSU provided in the above clause related to defaults (including breach of contract) by Contractor shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Contract.

29. THIRD PARTY BENEFICIARY:
OSU and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third parties.

30. WAIVER:
Failure of OSU to enforce any provision of this Contract will not constitute a waiver or relinquishment by OSU of the right to such performance in the future nor of the right to enforce any other provision of this Contract.

31. WORKERS' COMPENSATION:
The Contractor, its subcontractors, if any, and all employers providing work, labor or materials under this Contract are subject employers under the Oregon Workers' Compensation law and shall comply with ORS 656.017, which requires them to provide workers' compensation coverage that satisfies Oregon law for all their subject workers, unless such employees are exempt under ORS 656.126.

32. MERGER:
THIS CONTRACT CONSTITUTES THE ENTIRE CONTRACT BETWEEN THE PARTIES. THERE ARE NO UNDERSTANDINGS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS CONTRACT. NO AMENDMENT, CONSENT, OR WAIVER OF TERMS OF THIS CONTRACT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY ALL PARTIES. ANY SUCH AMENDMENT, CONSENT, OR WAIVER IS EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN.

EXHIBIT B
CERTIFICATIONS

By signature on this certification the undersigned certifies that they are authorized to act on behalf of the Proposer and that under penalty of perjury the undersigned will comply with the following:

SECTION I.   OREGON TAX LAWS
The undersigned hereby certifies under penalty of perjury that the undersigned is authorized to act on behalf of Proposer and that Proposer is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403.200 to 403.250 and ORS chapters 118, 314, 316, 317, 318, 321 and 323 and the elderly rental assistance program under ORS 310.630 to 310.706 and local taxes administered by the Department of Revenue under ORS 305.620.

SECTION II.   AFFIRMATIVE ACTION
The undersigned hereby certifies that they have not discriminated against Minority, Women or Emerging Small Business Enterprises in obtaining any required subcontracts, pursuant to OAR 580-061-0030 (3).

SECTION III.   COMPLIANCE WITH SOLICITATION
The undersigned agrees and certifies that they:
1.   Have read, fully understands and agrees to be bound by the Request for Proposal and all Exhibits and Addenda to the Request for Proposal; and
2.   Are an authorized representative of the Proposer, that the information provided is true and accurate, and that providing incorrect or incomplete information may be cause for rejection of the Proposal or Contract termination; and
3.   Will furnish the designated item(s) and/or service(s) in accordance with the Request for Proposal and the Contract; and
4.   Has provided a correct Federal Employer Identification Number or Social Security Number with the Proposal.

SECTION IV. PERMISSIVE COOPERATIVE PROCUREMENTS
If Proposer is awarded a contract from this Request for Proposal, Proposer hereby (check one)
☐ agrees
☐ disagrees
to offer the resulting contractual terms and prices to other public institutions.

Authorized Signature:_____   Date:_____

Name (Type or Print):_____   Telephone:(_____)_____

Title:_____   Fax:(_____)_____

FEIN ID# or SSN# (required):_____   Email:_____

Company:_____

Address, City, State, Zip:_____

Construction Contractors Board (CCB) License Number (if applicable):_____

Business Designation (check one):
☐ Corporation   ☐ Partnership   ☐ LLC   ☐ Sole Proprietorship   ☐ Non-Profit
Minority, Women & Emerging Small Business (MWESB) Certified Firm: ☐Yes ☐No
If yes, Minority, Women & Emerging Small Business (MWESB) Certification Number:_____

EXHIBIT C
REFERENCES

REFERENCE 1

COMPANY: _____ CONTACT NAME: _____

ADDRESS: _____ PHONE NUMBER: _____

CITY, STATE ZIP: _____ FAX NUMBER: _____

WEBSITE: _____ E-MAIL: _____

GOODS OR SERVICES PROVIDED: _____

REFERENCE 2

COMPANY: _____ CONTACT NAME: _____

ADDRESS: _____ PHONE NUMBER: _____

CITY, STATE ZIP: _____ FAX NUMBER: _____

WEBSITE: _____ E-MAIL: _____

GOODS OR SERVICES PROVIDED: _____

REFERENCE 3

COMPANY: _____ CONTACT NAME: _____

ADDRESS: _____ PHONE NUMBER: _____

CITY, STATE ZIP: _____ FAX NUMBER: _____

WEBSITE: _____ E-MAIL: _____

GOODS OR SERVICES PROVIDED: _____

Exhibit D
SPECIFICATIONS

MANDATORY FEATURES:

Please describe how your proposed Student Engagement Management System will provide the following MANDATORY features:

Phase 1 –Overall system (includes Co-Curricular Transcription/Data collection Hub) & Student Organization Management Module/s (Mandatory)

Overall System (Mandatory)
- Provides a Web-based interface that:
  - Meets or exceed OSU accessibility standards – available at http://oregonstate.edu/accessibility/ITpolicy
  - Maintains aesthetics similar to the look and feel of other OSU websites
  - Includes a top-quality user interface, accessible anywhere and is:
    - Compatible with mobile access (smart phone, tablets, etc)
    - Compatible with all current version of major web browsers and 1-2 generations behind (at a minimum, Internet Explorer, Firefox, Chrome and Safari)
    - Allows for fine-grained, configurable access control
- Customizable in terms of language and terms to fit with OSU (broadly and by program – departments)
- Allows for relational database development that:
  - Documents student involvement in different programs/services/clubs/orgs
  - Is able to track individual users and what they do within the system including amount of time in the system, what students do in the system and changes/ updates made
  - Can be partitioned to various modules and programs within then modules and can also be accessed at an administrator level to combine multiple data points into overarching reports
  - Allows information for inclusion in database to have several methods for entry including templates, forms, integration or pull from other databases, etc.
  - Contains an on-line data dictionary for data points including data steward definitions, etc. and relationships
  - Allows for reuse of existing data where appropriate to improve and speed up data entry
  - That places a high priority on overall workflow for users
- Allows for varying levels of Authentication including but not limited
  - First Level (into the main system)
    - ONID Auth - Distinguish and verify student, staff/faculty
    - Non-ONID Option – alumni and community partners
  - Second Level (into individual programs)
    - Check of eligibility for participation in activities (secondary check) - currently enrolled, student fees, purchased appropriate memberships - interact with Rec Trac/progress database or other method
  - Third Level – each term
    - Automatic verification of eligibility and change in status (students, memberships, sabbatical, etc)

- Marks as inactive
- Sends alerts to admin
    - Ability for users to hold multiple roles simultaneously (admin, student, member, officer,)
- Allows for multiple levels of access and security - Overall admins, program admins, student employees users, general student users(officers, general members), alumni, community partners, general community – to be defined with specific modules)
    - Support of multiple user/member statuses/roles/titles within an organization including but not limited to
        - Member, pledge, alumni, advisor, new-member, associate member, coach, etc.
        - Active, inactive, retired, graduated, deceased, etc.
        - Alumni access to update profile information
            - Support for members that become alumni by providing class or academic year fields
- Ability to import from Banner (Sungard/Ellucian) (through data warehouse or other intermediate resources, including .csv files) data including but not limited to:
    - Demographics information
    - Grade and credit verification
        - Student Orgs (attempted hours, completed hours, gpa/verification)
            - Fraternity and Sorority Life – GPA for individual members and tied to FERPA wavier release (available only to president/admins)
        - Learning Pathways – individual users (satisfactory course completion verification on specific courses in leadership)
    - Contact information
- Allows OSU to maintain ownership of all data
    - No use or sharing of data by company outside of OSU written permission
- Ability to access and download all customer-specific data (.csv, etc) collected through the system, through:
    - Query capability
    - Customized reporting which includes:
        - Ability to track, compare and report from multiple years
        - Variable date range specifications – fiscal year, calendar year, academic year, term by term, month to month, week to week, etc…
        - Various permission levels of reporting access
            - Based on user type/classification
            - Accessible data to be defined by module/unit/data manager
        - Ability to export major forms to "professional" looking document (i.e. pdf, word, etc)
        - Ability to create charts and graphs for all metrics over time, including demographic data
- Provides ability to archive events, membership, participation, registration, any documentation of involvement, assessment data, etc.
- Provides basic survey questions and evaluation tools for manual use including:
    - Exit surveys (primarily for users that will become listed as alumni)
- Provides an interface to manage content in a training/resource center that includes
    - A place to put training documents or instructions, checklists, and other helpful documents.

- o Archival of certain data from the system available to students
- o Leader/Officer curriculum for training with videos, course work, and possibly tied to an academic unit
- o Interaction with phase III of the project to document learning pathways
- Key word search functionality (groups, people, association with orgs, events, organizations – tied to permission levels)
- Ability to integrate waivers and volunteer service forms by program/event, in accordance with OSU policies pertaining to e-signature compliance for
  - o event/activity or program participation
  - o grade/record release
  - o Other waivers as needed
- Detailed calendaring including:
  - o Integration with EMS master calendar (Dean Evans & Associates) through direct mechanism or an API for auto posting to OSU calendar
  - o The ability to view upcoming events, courses, trainings and opportunities in list and calendar form
  - o Allows Admins to post events for learning pathways
  - o Ability for modules and program areas to create distinct/separate calendar for their events/activities
  - o Ability to access an aggregate calendar that allows for filtering
- Allows integration of website-embeddable widgets to present data from the system in existing websites, as needed (e.g. calendars, coming events lists, registration or join now buttons, officer profiles, club lists for browsing or searching, club details, social media links)
  - o Export out to campus websites of recognized student organizations specific to that sponsoring unit
- Capacity to use/integrate id card scanners for tracking event and activity attendance
- Provides risk assessment tools that include:
  - o Ability to assess risk related to organizations
  - o Ability to assess risk for events and activities of users, organizations and programs
  - o Ability for multiple users interfaces for interaction including
    - ▪ Office of risk management interface &
    - ▪ Faculty advisors, student leader & admin queues, etc

Student Org Management Module (<u>Mandatory</u>)
- Allows for online submission of annual registration forms including Organization Information Form (general information), risk assessment and sponsorship agreement - forms:
  - o is adaptable from program to program in order to collect differing info or use varying language
  - o is able to manage multiple types of orgs, each with different registration requirements and ability to expand types of org types and requirements. Current org types and their required forms include:
    - ▪ Sponsored Student Organizations
      - All must complete:
        - o Organization information Form (general registration info)
          - ▪ Upload constitution/governing documents
        - o Risk Assessment

- o Sponsorship Agreement
  - Sport Clubs must also complete
    - o Participation Wavier and Membership forms
- Voluntary Student Organizations
  - All must complete
    - o Organization information Form (general registration info)
      - Upload constitution/governing documents
    - o Risk Assessment
  - Fraternity and Sorority must also complete
    - o Grade release waiver and membership form
- Non-Affiliated Student Organizations
  - Organization information Form (general registration info)
- o is easily exported to printable documents as needed
- o is able to manage digital/electronic signatures and confirmations from multiple people on campus
- Capacity to upload documents to student group files and sync/integrate data where appropriate (i.e. Upload rosters from excel file to org affiliations)
- Ability to log-in and join student organizations/request membership
  - o Additionally, option to request information as an intermediate step before request to join
- Ability to track financial information, including but not limited to:
  - o payments of dues and other fees
  - o Online submission of external/financial sponsorships for sponsored student orgs
- Provide custom workflow associated with each process, including action items, notifications on user's home menu, and/or email notifications
- Provide easily customizable alerts and email notifications which include:
  - o Capacity for both automatic and manual notifications to officers, requesting updates of club status throughout the year including:
    - Pre-generated notifications of student user action items including but not limited to:
      - Club registration notices
      - Member registration notices
      - Process reminders
        - o Org registration
        - o Event/travel registration
      - Pending reminders
      - Confirmations of completion
    - Administrative alerts/ notifications
      - Notification of Completion
      - Updates
    - In-system notifications to users and staff when items are missing/incomplete or in-process
  - o Tracking of when actions within system occur, including:
    - date and time of submissions
    - messages & notifications history
    - event/activity submissions
    - user id associated with action

- o Email support for communicating with club presidents, officers, members, and campus staff including
  - ▪ Mass email provides a preview for editing of an email message prior to being sent (similar to a mail merge)
  - ▪ Integrated email messaging to communicate with individual users
  - ▪ Message/Communication history with every user and organization to see what emails/messages or notes have been sent or logged over time
  - ▪ Capacity to include attachments to emails sent from system
  - ▪ Populates email address/es to personal outlook based on roles
  - ▪ pick and choose who to message by role
    - • individual students
    - • all leadership/officers
    - • all club members
    - • advisors
    - • multiple groups from a similar sub-unit?
  - ▪ List-serve like capabilities - Ability to send email to large numbers of student users through database as needed
    - • Provide protection against email being flagged as spam
- • Ability to track, manage and report changes in officer positions over time including capacity to handle times of transition and maintain history of involvement and roles.
- • Provides safeguards against duplication – users, organizations, requests, status changes/updates
- • Ability to track organization awards and achievements including:
  - o Automatic routing of submitted info to marketing and other interested parties (to be determined by admin area)
  - o Awards nomination form (ability for student groups or other campus entities to nominate other student groups for honors/recognition)
- • Tracking for equipment/property owned by individual Sponsored Student Orgs
- • Ability for organizations to authorize specific members to access particular resources including:
  - o Equipment
  - o Storage areas
  - o Room/space reservation
- • Provide the following Sport Club specific Features:
  - o form integration (ie: practice requests, term reports, evaluations)
    - ▪ Online submission of rosters, practice requests, mid-year evaluations, term reports, coach/instructor application (volunteer form, coach agreement form)
  - o Club calendar to track events, practices, scores/results of past events
  - o Recent scores and accomplishments
  - o Club sports equipment management and tracking (e.g. tables and chairs)
  - o Clubs can view and request equipment for events
  - o Automatic and/or manual request of officers to complete rosters, practice request forms, mid-year evaluation, and term reports
  - o Varsity letter request form
  - o New club interest request form
  - o Graphic design request form

- • Provide the following Greek Life Specific Features
  - o Position change support of officers with digital signature required

- Provide Dynamic Event & Activity Reporting tool that includes:
    - An overarching risk assessment tool with ability for multiple users to interact
    - Event specific e-waiver development and ability to integrate (upload) paper waivers
    - Online submission of home/away, on-campus/off-campus or other hosted events & Travel, including the process for approving these events, submitting travel and driver info, and other relevant data. Keep in mind that:
        - Formal approval may be required for some orgs but not all
        - Faculty advisors will need access
        - Must be able to pre-populate and have drop down menus for data previously collected for individual users and previous, similar events
            - Names, positions, events, contact info, organization connections/affiliations/etc
        - Must be able to Insert/upload documents, designs, video, pictures or any other event marketing, through the system for admin approval
    - Ability to assist with work flow related to project planning including:
        - required steps
        - details and information during planning
        - generate trip itineraries, emergency contact information, rosters, etc. upon fields being populated
    - Ability to generate form letters informing faculty of upcoming club-related travel
    - Post-event data collection/assessment integration for club officers (i.e. number of spectators, how many teams, results)
        - Ability to report successes/achievements on an ongoing basis through an event debrief form which include specific questions based on event type

Phase 2 – Service Learning/Civic Engagement Module (Mandatory)

- Ability to register/RSVP to events that are both:
    - repeating or ongoing
    - one-time, non-recurring event
- Ability to set limit or capacity for events and numbers who RSVP
    - Establish waitlist that will be emailed when spaces open
- Ability to send automated confirmation emails and reminders to those who RSVP for projects/programs with attachments
- Ability to have non-OSU (community non-profits) users/email addresses submit service, internship, job, etc. opportunities and events
    - Automatically update CCE website and calendar with new event and opportunity submissions into system
- Ability to track service hours and generate reports in the following ways:
    - by editable categories including but not limited to:
        - hunger
        - environmental
        - youth
        - etc.
    - for report generating

- by groups - student organization, Greek chapters, residence halls, etc. including the ability to:
  - associate individual users with their group affiliation/s
- Ability to confirm service hours with community partners via email from system
- Ability to create forms and add forms for event requirements
- Ability to assist with work flow related to project planning
  - i.e. alternative spring break planning
    - creation of required steps
    - details and information during planning
    - generate trip itineraries, emergency contact information, rosters, etc. upon fields being populated
- Ability to house information related to community partner relationships, type or organization, type of service offered, etc.
- Ability to track payments of fees for alternative break trips
- Provide easily customizable alerts and email notifications that mirror that of the student organization module as follows:
  - Capacity for easily customizable automatic and manual notifications including:
    - Pre-generated notifications of user and group action items that are including but limited to:
      - Student user action items like
        - Trip fee payment due notices
        - Event *r*eminders
      - Administrative alerts/ notification
        - Updates
        - Event/activity submissions
      - Tracking of when actions within system occur, including:
        - date and time of submissions
        - messages & notifications history
        - event/activity submissions
        - user id associated with actions
    - Email support for communicating with individual users, organizations and community partners, etc. including:
      - Mass email provides a preview for editing of an email message prior to being sent (similar to a mail merge)
      - Integrated email messaging to communicate with individual users
      - Message/Communication history with every user and organization to see what emails/messages or notes have been sent or logged over time
      - Capacity to include attachments to emails sent from database
      - Populates email address/es to personal outlook based on roles
      - Pick and choose who to message by role
        - leadership pathway
        - alt break trip
        - general civic engagement participant
      - List-serve like capabilities - Ability to send email to large numbers of student users through database as needed
        - Provide protection against email being flagged spam

Phase 3 – Co-Curricular Learning Module (Mandatory)

- Provide structure and organization to co-curricular learning at OSU in the form of a curriculum with tracks and levels Including the:
    - ability to build, manage and customize tracks and levels of curriculum
    - ability for staff to maintain and update terms, courses, requirements, tracks, levels and certificates
    - ability to track individual student progress through the curriculum and towards completion
    -
- Provide an incentive for students to reports involvement in co-curricular learning and opportunity to obtain data about those experiences by providing students:
    - a single place to view learning tracks/pathways, training and opportunities
    - the opportunity to log achievements, courses, experiences, self-assessment and other assessment items related to co-curricular learning
    - access to curriculum tracks and ability to mark requirements complete
    - access to concrete assessment tools in order to collect data related to all co-curricular learning
    - the opportunity to score themselves using rubrics that assess how the student did in meeting the requirements for a certificate or achievement
    - the ability to petition for credit as necessary
        - Upload supporting documents
        - Notification to staff for approval
        - Accepted credit counts towards achievement
    - The ability to apply for certificates or levels as applicable
- Ability to generate certificates/portfolios that can be viewed, downloaded and printed including
    - Ability for alumni to access and print after graduation

PREFERRED FEATURES:

Additionally please describe how your proposed Student Engagement Management System will meet the following PREFERRED features. If you are unable to provide the feature in your system, please list the feature and note "THIS FEATURE NOT AVAILABLE":

Phase 1 –Overall system (includes Co-Curricular Transcription/Data collection Hub) & Student Organization Management Module/s

Overall System (Preferred)
- Back-ups - with point in time recovery
- Error fixes, maintenance and on-going enhancements included
- Flexible platform designed for rapid implementation of new processes and process improvements
- Little or no training required to use system
- Inclusion of a user guide
- Ability to interface/pull data from other OSU databases including

- o Student employment system
- o Tillikum
- o Rec Trac (Vermont Systems)
- o Beaver Job Net (Symplicity)
- o EMS (Dean Evans & Associates)
- o HandsOn Connect (community action agency/community volunteer opportunity database)
- o Compliance Assist (Campus Labs)
- o University motor Pool database
- Ability to track contact hours of faculty/staff with organizations, events and student experiences in a way that could be reportable (i.e. advising, training, meetings, forming org)

Student Org System (Preferred)
- Ability for student organizations to collect payment online (dues, event registrations, etc)
  - o *Budget tracking and management*
  - o Financial Sponsorship tracking (workflow/routing & approval)
    - ▪ E-signatures
    - ▪ Paperwork
    - ▪ Invoice generation
- File Syncing tool designed to help easily share files between staff and officers

Phases 2 and 3 do not have preferred specifications. All features in Phases 2 and 3 are Mandatory.