AMENDMENT TO SOLICITATION

<u>**Amendment No. 4**</u>

DATE: July 31, 2014

TO: ALL VENDORS

FROM: Mac Stiles, Procurement Manager

SOLICITATION NUMBER: USC-RFP-2630-MS

DESCRIPTION: Provide management software solution for storing and documenting faculty credentials.

This **Amendment No. 4** modifies the **Request For Proposal** only in the manner and to the extent as stated herein.

Item One: VENDOR QUESTIONS

RE: Faculty Credential Requirements - Capable of importing data from Banner (course data) and PeopleSoft (HR data).

Q1: What will be the field structure and content coming from Banner and PeopleSoft (HRdata)?

A1: It can vary.

Q2: Do you want csv or xml exchanges or direct table exchanges?

A2: CSV or xml

Q3: What type of information is supplied by Banner and what is supplied by Peoplesoft?

A3: Banner is our student ERP system. In banner you will find all types of student data, courses data, financial aid, building data, faculty data. Peoplesoft is going to be the management system for our HR data for the University. Peoplesoft will include HR data on faculty, staff, and students.

Q4: What is the expected use of the data coming from either Banner or Peoplesoft?

A4: The information from Banner and Peoplesoft will be used to populate our faculty roster.

RE: Secure document storage that allows links to documents within the SOUTHERN ASSOCTATION OF COLLEGES AND SCHOOLS (SACS) Faculty Roster.

Q5: What type of document format is SACS is it a "Excel spreadsheet or a Database and if a database who is the manufacturer?

A5: SACS is not a system, but rather a format that we need to have our data in for external reviewers.

Q6: Can you supply a format or a live demonstration of the SACS?

A6: SACS is not a system it is an accrediting body for the institution. We have to provide the accrediting body with information regarding what courses faculty are teach and if they are credentialed to teach the courses that they are teaching.

RE: HR representatives within academic departments or colleges should be able to upload transcripts and edit information for faculty in their department/college, but not be able to view or edit information for faculty outside their department/college.

Q7: What format are the transcripts in for archiving (i.e. Database, Word, PDF, TIF, Excel, etc)?

A7: These are typically pdf files.

RE: SOUTHERN ASSOCIATION OF COLLEGES AND SCHOOLS (SACS) Faculty Roster format that provides space to list relevant coursework, licenses, work experiences and other qualifications, in addition to academic degrees.

Doc Detail is a separate database that attaches to each document. This is done with HTML and use of various Field components.

Q8: Can you provide examples of the above and is it in the form of data. Or is it both data and documents of some kind?

A8: http://www.sacscoc.org/subchg/policy/FACULTYROSTERINSTRUCTIONS.pdf

RE: Exceptions/gap reports that show missing credentials, new courses being taught by faculty members, expired licenses, etc.

Q9: Are these reports now available?

A9: No these reports are not available now. In order to identify these gaps we would have to do this manually.

RE: Accreditation Requirements
Accreditation template is current and pre-loaded into the system.

> Q10: What is the Accreditation template composed of (field labels, etc)? What are the components needed (i.e. text, drop down, notes, calendar, etc)?

> A10: https://sacs.sc.edu/compliance.html This template should match with any new updates from SACSCOC.

RE: Ability to create a secure document directory and embed links and source documents with the self-study narrative.

> Q11: What does the self study narrative look like? Are these notes by date?

> A11: You will find examples of the standards that we need to respond to at the following website: https://sacs.sc.edu/compliance.html. Click on the links in the compliance table and you will see the example narratives. These are not by date, but it would be nice to have a time stamp so that we would know that last time that each narrative was updated. There will be different individuals assigned to work on each standard. We need to have a system that keeps track of who worked on what and when.

RE: Campus administrators or evaluators can view self-study reports and documentation anytime, anywhere.

> Q12: How many self-study reports are there or are they always a custom report?

> A12: There is always going to be one self-study report that we are working on. The other reports will be old archived reports.

RE: Interim report sections to allow University to efficiently maintain accreditation between renewal years.

> Q13: How does the accreditation between years work? Are there examples available?

> A13: We are moving towards a process where we would like to review each of our standards at least once a year to maintain a culture of continuous compliance. Attached in the Appendix is an example of a review schedule that we are looking at using between accreditation cycles.

RE: An online demonstration of the software is essential once the top vendors have been selected. Those vendors that qualify for a two hour demonstration will be provided an itinerary of the elements of which demonstration should entail. There will be a two stage evaluation. The first stage will be ranked on:

Capable of importing data from Banner (course data) and PeopleSoft (HR data).

> Q14: Can you provide the method in which you desire to share data?
> A14: We need to present data in the following format: https://sacs.sc.edu/compliance.html

RE: Secure document storage that allows links to documents within the SOUTHERN ASSOCIATION OF COLLEGES AND SCHOOLS (SACS) Faculty Roster.

Q15: Is there a database or Excel spreadsheet that is currently recording this data? We understand that this is currently a manual process – we can demonstrate a sample grid, but we would need the full scope or definitions of what the SACS faculty roster is made up of. Can you provide these?

A15: We are currently using an excel spread sheet to record faculty credential data. This is not efficient and it requires a lot of copying and pasting in order to get it into the format that we need it in for SACS. At the following site you will find the instructions as well as an example of the layout for the faculty roster:
http://www.sacscoc.org/subchg/policy/FACULTYROSTERINSTRUCTIONS.pdf

RE: Interim report sections to allow University to efficiently maintain accreditation between renewal years.

Q16: What are the Interim reports and what is their composition? Are there examples available?
A16: We are currently preparing for our fifth year interim report:
(http://www.sacscoc.org/fifth%20year/Fifth%20Year%20Interim%20Report%20Updated.doc)

Bidder shall acknowledge receipt of Amendment No. 2 in the space provided below and return it with their bid response. Failure to do so may subject bid to rejection.

_____   _____
 Authorized Signature   Name of Offeror

_____
 Date

APPENDIX

SACS Compliance Review Schedule

					Date Last reviewed	Days Until Next Review Date	Days Until Deadline
							7/31/14
Yellow = Needed for fifth year report.							
						8/23/12	9/26/12
		Type	Standard	Title		-707	-673
Group 1	**Focus Areas: Authority and Board Control**	Core Requirement	2.1	Degree-granting Authority	09/01/10		Review Needed
		Core Requirement	2.2	Governing Board	09/01/10		Review Needed
		Core Requirement	2.3	Chief Executive Officer	09/01/10		Review Needed
Start Review 4th Thurs. in Aug, Complete by 4th Wed in Sept.		Core Requirement	2.4	Institutional Mission	09/01/10		Review Needed
		Core Requirement	2.6	Continuous Operation	09/01/10		Review Needed
		Comp. Standard	3.1.1	Institutional Mission	09/01/10		Review Needed
		Comp. Standard	3.2.2	Governing Board Control	09/01/10		Review Needed
		Comp. Standard	3.2.2.1	Governing Board Control: Institution's mission.	09/01/10		Review Needed
		Comp. Standard	3.2.2.2	Governing Board Control: Fiscal stability of the institution	09/01/10		Review Needed
		Comp. Standard	3.2.2.3	Governing Board Control: Institutional policy	09/01/10		Review Needed
		Comp. Standard	3.2.3	Board Conflict of Interest	09/01/10		Review Needed
		Comp. Standard	3.2.4	External Influence	09/01/10		Review Needed
		Comp. Standard	3.2.5	Board Dismissal	09/01/10		Review Needed
		Comp. Standard	3.2.6	Board/Administration Distinction	09/01/10		Review Needed
		Comp. Standard	3.2.11	Control of Intercollegiate Athletics	09/01/10		Review Needed
		Comp. Standard	3.2.12	Fund-raising Activities	09/01/10		Review Needed
		Comp. Standard	3.2.13	Institution-Related Entities	09/01/10		Review Needed
		Comp. Standard	3.2.14	Intellectual Property Rights	09/01/10		Review Needed
		Comp. Standard	3.12.1	Substantive Change	09/01/10		Review Needed

					Date Last reviewed	Days Until Next Review Date	Days Until Deadline
						9/27/12	10/24/12
		Type	Standard	Title		-672	-645
Group 2	**Focus Area: Faculty**	Core Requirement	2.8	Faculty	09/01/10		Review Needed
		Comp. Standard	3.4.11	Academic Program Coordination	08/01/11		Review Needed
		Comp. Standard	3.5.4	Terminal Degrees of Faculty	08/01/11		Review Needed
		Comp. Standard	3.7.1	Faculty Competence	08/01/11		Review Needed
Start Review 4th Thur. in Sept, Complete by 4th Wed in Oct.		Comp. Standard	3.7.2	Faculty Evaluation	09/01/10		Review Needed
		Comp. Standard	3.7.3	Faculty Development	09/01/10		Review Needed
		Comp. Standard	3.7.4	Academic Freedom	09/01/10		Review Needed
		Comp. Standard	3.7.5	Faculty Role in Governance	09/01/10		Review Needed

					Date Last reviewed	Days Until Next Review Date	Days Until Deadline
						10/25/12	11/28/12
		Type	Standard	Title		-644	-610
Group 3	**Focus Area: IE, Assessment and Program Review**	Core Requirement	2.5	Institutional Effectiveness	09/01/10		Review Needed
		Comp. Standard	3.3.1	Institutional Effectiveness	09/01/10		Review Needed
Start Review 4th Thurs in Oct., Complete by 4th Wed in Nov.		Comp. Standard	3.3.1.1	Institutional Effectiveness: Educational Programs, to Include Student Learning Outcomes	09/01/10		Review Needed
		Comp. Standard	3.3.1.2	Institutional Effectiveness: Administrative Support Services	09/01/10		Review Needed
		Comp. Standard	3.3.1.3	Institutional Effectiveness: Academic and Student Support Services	09/01/10		Review Needed
		Comp. Standard	3.3.1.4	Research Within its Educational Mission, if Appropriate	09/01/10		Review Needed
		Comp. Standard	3.3.1.5	Community/Public Service Within its Mission, if Appropriate	09/01/10		Review Needed
		Comp. Standard	3.5.1	General Education Competencies	09/01/10		Review Needed
		Federal Req.	4.1	Student Achievement	09/01/10		Review Needed

		Type	Standard	Title	Date Last reviewed	Days Until Next Review Date	Days Until Deadline
						11/29/12	1/23/13
						-609	-554
		Core Requirement	2.7.1	Program Length	09/01/10		Review Needed
Group 4	**Focus Areas: Admssions, Records, Program and Curriculum Basics**	Core Requirement	2.7.2	Program Content	09/01/10		Review Needed
		Core Requirement	2.7.3	General Education	09/01/10		Review Needed
		Comp. Standard	3.4.1	Academic Program Approval	09/01/10		Review Needed
Start Review 4th/5th Thur. in Nov., Complete by 4th Wed in Jan.		Comp. Standard	3.4.3	Admission Policies	09/01/10		Review Needed
		Comp. Standard	3.4.10	Responsibility for Curriculum	09/01/10		Review Needed
		Comp. Standard	3.6.2	Graduate Curriculum	09/01/10		Review Needed
		Comp. Standard	3.9.1	Student Rights	09/01/10		Review Needed
		Comp. Standard	3.9.2	Student Records	09/01/10		Review Needed
		Federal Req.	4.2	Program Curriculum	09/01/10		Review Needed
		Federal Req.	4.4	Program Length	09/01/10		Review Needed
		Federal Req.	4.6	Recruitment Materials	09/01/10		Review Needed

		Type	Standard	Title	Date Last reviewed	Days Until Next Review Date	Days Until Deadline
						1/24/13	2/27/13
						-553	-519
		Core Requirement	2.7.4	Coursework for Degrees	09/01/10		Review Needed
Group 5	**Focus Areas: Academic Credits and Degree Requirments**	Comp. Standard	3.4.2	Continuing Education/Service Programs	09/01/10		Review Needed
		Comp. Standard	3.4.4	Acceptance of Academic Credit	09/01/10		Review Needed
Start Review 4th Thur. in Jan., Complete by 4th Wed. in Feb.		Comp. Standard	3.4.5	Academic Policies	09/01/10		Review Needed
		Comp. Standard	3.4.6	Practices for Awarding Credit	09/01/10		Review Needed
		Comp. Standard	3.4.8	Noncredit to Credit	09/01/10		Review Needed
		Comp. Standard	3.5.2	Institutional Credits for a Degree	09/01/10		Review Needed
		Comp. Standard	3.5.3	Undergraduate Program Requirements	09/01/10		Review Needed
		Comp. Standard	3.6.1	Post-Baccalaureate Program Rigor	09/01/10		Review Needed
		Comp. Standard	3.6.3	Institutional Credits for a Graduate Degree	09/01/10		Review Needed
		Comp. Standard	3.6.4	Post-Baccalaureate Program Requirements	09/01/10		Review Needed

		Type	Standard	Title	Date Last reviewed	Days Until Next Review Date	Days Until Deadline
						2/23/12	3/28/12
Group 6						-889	-855

		Federal Req.	4.8	Distance and correspondence education	09/01/10		Review Needed
Start Review 4th Thurs. in Feb., Complete by 4th Wed. in Mar	**Focus Area: Distance Education**	Federal Req.	4.8.1	demonstrates that the student who registers in a distance or correspondence education course or program is the same student who participates in and completes the course or program and recieves the credit by verifying the identity of a student who participates in class or coursework by using, at the option of the institution, methods such as (a) a secure login and pass code, (b) proctored examinations, or (c) new or other technologies and practices that are effective in verifying student identification.	09/01/10		Review Needed
		Federal Req.	4.8.2	has a written procedure for protecting the privacy of students enrolled in distance and correspondence education courses or programs.	09/01/10		Review Needed
		Federal Req.	4.8.3	has a written procedure distributed at the time of registration or enrollment that notifies students of any projected additional student charges associated with verification of student identity.	09/01/10		Review Needed
		Federal Req.	4.9	Definition of credit hours	09/01/10		Review Needed

						Date Last reviewed	Days Until Next Review Date	Days Until Deadline
							3/29/12	4/25/12
							-854	-827
		Type	**Standard**		**Title**			
Group 7		Core Requirement	2.11.1		Financial Resources	09/01/10		Review Needed
	Focus Areas:	Core Requirement	2.11.2		Physical Resources	09/01/10		Review Needed
	Finances, Facilities	Comp. Standard	3.4.7		Consortial Relationships/Contractual Agreements	08/01/11		Review Needed
Start Review 4th/5th	**and Other**	Comp. Standard	3.10.1		Financial Stability	09/01/10		Review Needed
Thurs. in Mar.,		Comp. Standard	3.10.2		Financial Aid Audits	09/01/10		Review Needed
Completed by 4th Wed.		Comp. Standard	3.10.3		Control of Finances	09/01/10		Review Needed
in Apr.		Comp. Standard	3.10.4		Control of Sponsored Research/External Funds	09/01/10		Review Needed
		Comp. Standard	3.11.1		Control of Physical Resources	09/01/10		Review Needed
		Comp. Standard	3.11.2		Institutional Environment	09/01/10		Review Needed
		Comp. Standard	3.11.3		Physical Facilities	09/01/10		Review Needed
		Comp. Standard	3.14.1		Publication of Accreditation Status	09/01/10		Review Needed
		Federal Req.	4.3		Publication of Policies	09/01/10		Review Needed
		Federal Req.	4.7		Title IV Program Responsibilities	09/01/10		Review Needed

						Date Last reviewed	Days Until Next Review Date	Days Until Deadline
							4/26/12	5/23/12
		Type	**Standard**		**Title**			
							-826	-799
Group 8		Comp. Standard	3.2.1		CEO Evaluation - Selection	09/01/10		Review Needed
	Focus Area:	Comp. Standard	3.2.7		Organizational Structure	09/01/10		Review Needed
	Administration and	Comp. Standard	3.2.8		Qualified Administrative - Academic Officers	09/01/10		Review Needed
Start Review 4th Thurs.	**Staff**	Comp. Standard	3.2.9		Personnel Appointment	09/01/10		Review Needed
in Apr., Completed by		Comp. Standard	3.2.10		Administrative Staff Evaluations	09/01/10		Review Needed
4th Wed. in May		Comp. Standard	3.8.3		Qualified Staff	09/01/10		Review Needed

		Type	Standard	Title	Date Last reviewed	Days Until Next Review Date	Days Until Deadline
						5/24/12	6/28/12
						-798	-763
Group 9	**Focus Area: Student Support Services**	Core Requirement	2.9	Learning Resources and Services	09/01/10		Review Needed
		Core Requirement	2.10	Student Support Services	09/01/10		Review Needed
		Comp. Standard	3.4.9	Academic Support Services	09/01/10		Review Needed
Start Review 4th Thurs. in May., Completed by 4th Wed. in June		Comp. Standard	3.4.12	Technology Use	09/01/10		Review Needed
		Comp. Standard	3.8.1	Learning-Information Resources	09/01/10		Review Needed
		Comp. Standard	3.8.2	Instruction of Library Use	09/01/10		Review Needed
		Comp. Standard	3.9.3	Qualified Staff	09/01/10		Review Needed
		Federal Req.	4.5	Student Complaints	09/01/10		Review Needed
		Year-Round Standards for Review					
		Core Requirement	1.1	Integrity			
		Core Requirement	2.12	Quality Enhancement Plan			
		Comp. Standard	3.3.2	Quality Enhancement Plan	08/01/11		
		Comp. Standard	3.13	Responsibility for Compliance with other Commission Policies			
		Comp. Standard	3.13.1	Policy Compliance			

Next Reaffirmation in 2021 (Reaffirmed in 2011)

Description of Activity	Track B
Institutions receive Notification Letter from the President of Commission on Colleges	4/25/2016*
Due date for Fifth-Year Interim Report	3/25/2017*
Review by the Commission on Colleges	6/1/2017*

*Estimated based on SACS Website

Source: http://sacscoc.org/fifth%20year/Timeline%20Charts%20for%202016%20thru%202020.pdf