



# UNIVERSITY OF SOUTH CAROLINA

AMENDMENT NO. 1 TO SOLICITATION

TO: ALL VENDORS

FROM: Charles Johnson, Procurement Manager

SUBJECT: SOLICITATION NUMBER: USC-RFP-3086-CJ

DESCRIPTION: International Relationship Management Database

DATE: February 9, 2017

---

This Amendment No. 1 modifies the Request for Proposals only in the manner and to the extent as stated herein.

Vendor Questions and Answers

THE DEADLINE FOR RECEIPT OF PROPOSALS HAS BEEN CHANGED FROM 2:30 PM ON FEBRUARY 17, 2017 TO 11:00 AM ON FEBRUARY 22, 2017.

THE AWARD POSTING DATE FOR THE SOLICITATION HAS BEEN CHANGED FROM MARCH 3, 2017 TO MARCH 6, 2017.

UNIV 1.52: APPENDIX 4 Contract Addendum for External Data & Systems Service Providers Version 06/07/2016 has been added to the solicitation

The System Requirements/Features Table in Section III of the solicitation has been revised.

---

BIDDER SHALL ACKNOWLEDGE RECEIPT OF AMENDMENT NO. 1 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

**THE DEADLINE FOR RECEIPT OF PROPOSALS HAS BEEN CHANGED FROM 2:30 PM ON FEBRUARY 17, 2017 TO 11:00 AM ON FEBRUARY 22, 2017.**

**THE AWARD POSTING DATE FOR THE SOLICITATION HAS BEEN CHANGED FROM MARCH 3, 2017 TO MARCH 6, 2017.**

**THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR A:**

**QUESTION 1:** Elaborate on REQ 060. Req 060 Should provide capability to capture international alumni locales

**ANSWER:** a. University of South Carolina (UofSC) needs to internally maintain private records of where UofSC alumni are living and working for

- US residents who are outside of the US
- non-US residents who are in the US

b. UofSC needs to provide on a web-based global map a public view of aggregate data showing where UofSC alumni are living and working.

**QUESTION 2:** Elaborate on REQ 061. Req 061 Should provide capability to capture international alumni activities

**ANSWER:** a. University of South Carolina (UofSC) needs to internally maintain private records of UofSC alumni work related visits, events and research for

- US residents who are outside of the US
- non-US residents who are in the US

- b. UofSC needs to provide on a web-based global map a public view of aggregate data showing where officially organized UofSC alumni activities are occurring.

**THE FOLLOWING QUESTIONS WERE RECEIVED FROM VENDOR B:**

**QUESTION 1:** How many users need access to the system?

**ANSWER:** The University estimates there will be

- 200 UofSC user accounts with role-based permissions to access private records
- 30 to 35 UofSC concurrent users logged in throughout the day
- Unlimited concurrent public users viewing the global maps with no logins needed

**THE FOLLOWING QUESTION WAS RECEIVED FROM VENDOR C:**

**Question:** Per the Scope of Services section, items REQ.001 to REQ.116, may proposers add an additional column to the response table for clarification of answers and/or include footnotes for clarification of responses to this section?

**ANSWER:** The System Requirements/Features Table in Section III of the solicitation has been revised to include Comments and can be used to capture offeror's responses. The revised System Requirements/Features begins on the next page.

**REVISED SYSTEM REQUIREMENTS/FEATURES TABLE**

REQ ID	Requirement Statement	M(andatory) P(referred)	Y(Yes, currently supported by software) N(No, not currently supported by software) OC(Offeror custom development required) UC(UofSC custom development required) F(Future supported by Offeror)	If Future, anticipated date of availability	Additional Comments
<b>SUPPORT: SUPPORT</b>					
REQ.001	Should Provide designated account manager	P			
REQ.002	Could Provide toll-free number for phone support	P			
REQ.003	Could Provide live operator for phone support	P			
REQ.004	Must Provide online support - email	M			
REQ.005	Could Provide online support - live chat	P			
REQ.006	Must Provide Eastern Time Zone business hours support	M			
REQ.007	Should Provide technical support 24/7/365	P			
REQ.008	Should Provide immediate response (< 1 hr) for critical issues e.g. business stoppage	P			
REQ.009	Should Provide same-day response for non-critical issues	P			
REQ.010	Could Have active online user groups(s)	P			
REQ.011	Should Provide a permanent Test environment	P			
REQ.012	Should Provide a sandbox to demo product	P			
REQ.013	Must Provide English as primary language for phone, email and live chat support as applicable	M			
REQ.014	Could Provide online training materials (Help, Tutorial)	P			
<b>SYSTEM REQUIREMENTS/FEATURES: ACCESSIBILITY</b>					
REQ.015	Must Be accessible via the web	M			
REQ.016	Must Be user friendly	M			
REQ.017	Must Be compatible with the latest versions of web browsers that run on MACs and PCs	M			
REQ.018	Should Be ADA compliant for web applications	P			
REQ.019	Could Provide customizable dashboard view of data in a visual, engaging perspective	P			

REQ.020	Could Provide mobile application to view data	P			
REQ.021	Could Provide mobile application to manage data	P			
REQ.022	Must Provide UofSC staff with immediate access to agreements, institutions, contacts, reporting	M			
<b>SYSTEM REQUIREMENTS/FEATURES: CONFIGURATION</b>					
REQ.024	Must Provide capability to configure categories of agreements	M			
REQ.025	Must Provide capability to configure categories of activities	M			
REQ.026	Should Provide capability to set local time by user	P			
REQ.027	Should Provide capability to set the local time of the system/server	P			
REQ.028	Must Allow UofSC to manage user accounts (sysadmin)	M			
REQ.029	Must Allow UofSC to set user access privileges (sysadmin)	M			
REQ.030	Must Allow UofSC to configure standardized lists (sysadmin)	M			
REQ.031	Must Allow UofSC to set user access privileges based on user roles (sysadmin)	M			
REQ.032	Must Provide capability to maintain institutions	M			
REQ.033	Must Provide capability to maintain countries	M			
REQ.034	Must Provide capability to maintain people: faculty	M			
REQ.035	Must Provide capability to maintain people: students	M			
REQ.036	Must Provide capability to maintain people: staff	M			
REQ.037	Must Provide capability to maintain people: external contacts	M			
<b>SYSTEM REQUIREMENTS/FEATURES: CUSTOMIZATION</b>					
REQ.038	Should Allow UofSC to customize: add new fields (sysadmin)	P			
REQ.039	Should Provide capability to customize for UofSC terminology	P			
REQ.040	Could Allow UofSC to customize: modify field labels (sysadmin)	P			
REQ.041	Should Allow UofSC to customize external view of data: branding (sysadmin)	P			
<b>SYSTEM REQUIREMENTS/FEATURES: FUNCTIONALITY</b>					

REQ.042	Must Provide capability to track status of agreement: e.g. Draft, Pending Approval, Active, Expiring, Expired	M			
REQ.043	Must Provide capability to track approval status of agreement: e.g. Internal USC Approval, Partner Approval, Fully Executed	M			
REQ.044	Must Provide capability to manage agreements	M			
REQ.045	Must Provide capability to manage relationships between entities	M			
REQ.046	Must Provide capability to manage agreement renewals	M			
REQ.047	Must Provide capability to notify selected users about upcoming renewals	M			
REQ.048	Must Provide capability to choose from standardized lists (drop-down)	M			
REQ.049	Must Provide capability to search and filter agreements by user defined criteria	M			
REQ.050	Must Provide capability to categorize agreements	M			
REQ.051	Must Provide capability to sub-categorize agreements	M			
REQ.052	Must Provide capability to track agreements through the approval process	M			
REQ.053	Must Provide capability to capture mobility: faculty	M			
REQ.054	Must Provide capability to capture activities: faculty	M			
REQ.055	Must Provide capability to capture mobility: students	M			
REQ.056	Must Provide capability to capture activities: students	M			
REQ.057	Must Provide capability to capture mobility: staff	M			
REQ.058	Must Provide capability to capture activities: staff	M			
REQ.059	Must Provide capability to capture visits from delegations	M			
REQ.060	Should Provide capability to capture international alumni locales	P			
REQ.061	Could Provide capability to capture international alumni activities	P			
REQ.062	Must Provide capability to categorize activities	M			
REQ.063	Must Provide capability to print forms as needed	M			
REQ.064	Should Provide capability to approve or deny agreements electronically in an automated workflow	P			

REQ.065	Should Provide capability to approve or deny agreements at multiple levels in an automated workflow	P			
REQ.066	Could Provide capability to copy existing agreements as new agreements with the ability to update specific fields	P			
REQ.067	Must Provide capability to attach multiple documents to agreements (word, pdf, image)	M			
REQ.068	Should Provide capability to view historical information	P			
REQ.069	Should Provide capability to route attached documents with agreements in an automated workflow	P			
REQ.118	Could Capture travel safety information specific to a country/location	P			
<b>SYSTEM REQUIREMENTS/FEATURES: INTEGRATION/INTERFACE</b>					
REQ.070	Should Allow UofSC to interface with other systems: USCeRA	P			
REQ.071	Should Allow UofSC to interface with other systems: fsaAtlas	P			
REQ.072	Should Allow UofSC to interface with other systems: Horizons Simplicity	P			
REQ.073	Should Allow UofSC to integrate with Shibboleth for login authentication	P			
REQ.074	Should Allow UofSC to integrate with CAS for login authentication	P			
REQ.075	Must Allow UofSC to import data from other sources	M			
REQ.076	Must Allow UofSC to export data to other formats	M			
<b>SYSTEM REQUIREMENTS/FEATURES: REPORTING</b>					
REQ.077	Must Provide capability to report on agreements	M			
REQ.078	Must Provide capability to report on countries	M			
REQ.079	Must Provide capability to report on grant related activities: faculty	M			
REQ.080	Must Provide capability to report on non-grant related activities: faculty	M			
REQ.081	Must Provide capability to report on grant related activities: staff	M			
REQ.082	Must Provide capability to report on non-grant related activities: staff	M			



REQ.083	Must Provide capability to report on other activities: faculty	M			
REQ.084	Must Provide capability to report on other activities: staff	M			
REQ.085	Must Provide capability to report on activities: student	M			
REQ.086	Must Provide capability to report on representative(s) visits to UofSC	M			
REQ.087	Must Provide capability to report on institutions: internal	M			
REQ.088	Must Provide capability to report on institutions: external	M			
REQ.089	Must Provide capability to create standard reports	M			
REQ.090	Must Provide capability to create adhoc reports	M			
REQ.091	Should Provide searchable global map view of the data: internal	P			
REQ.092	Must Provide searchable global map view of the data: public	M			
REQ.093	Must Provide capability to report on custom fields	M			
REQ.094	Must Provide capability to report on grant related visits to institutions	M			
REQ.095	Must Provide capability to report on non-grant related visits to institutions	M			
REQ.096	Must Provide capability to report on other visits to institutions	M			
REQ.097	Must Provide capability for reports to be printed or exported to CSV	M			
REQ.098	Should Provide capability to filter on custom fields	P			
REQ.099	Should Provide capability to report on historical information	P			

REQ.117	<p>Must Provide capability to report on everything UofSC has going on in country a), b) and c). Example requests:</p> <ol style="list-style-type: none"> <li>1. How many agreements do we have in a particular country?</li> <li>2. What types of agreements do we have in a particular country?</li> <li>3. How many agreements do we have in a particular institution?</li> <li>4. What types of agreements do we have in a particular institution?</li> <li>5. How many new agreements have been established in the last year and with which institutions?</li> <li>6. How many international degree seeking/study abroad students are studying at Uof SC from country a), b), and c) at the moment?</li> <li>7. How many international faculty, staff, visiting scholars does UofSC employ from country a), b), and c) at the moment?</li> <li>8. How many students, staff and faculty are in certain areas and countries? e.g. in case of terrorist attacks or natural disaster.</li> </ol>	M			
<b>SYSTEM REQUIREMENTS/FEATURES: SYSTEM</b>					
REQ.100	Must Allow multiple concurrent user logins	M			
REQ.101	Must Allow guest users to see a map view of summary data without requiring a login or collecting user data	M			
REQ.102	Must Use third party software that is easily accessible if additional software is required to function (e.g. java, Flash)	M			
REQ.103	Must Be available 99.9% of time excluding regular maintenance	M			
REQ.104	Must Be scalable to support growth; for example number of users, number of agreements	M			
REQ.105	Must Prevent deletion of parent records when children records exist	M			
REQ.106	Should Have the capability for secure file uploads	P			
REQ.107	Should Electronically notify initiator of approve decision	P			
REQ.108	Should Electronically notify initiator of deny decision	P			
REQ.109	Should Have a report log of activities	P			
REQ.110	Should Support web services and API functionality	P			
REQ.111	Should Provide electronic approval workflow for authorized faculty and staff to approve or deny agreements	P			

REQ.112	Could Provide support for multi-lingual configurations with English as the primary language	P			
REQ.113	Could Alert responsible organization unit if approval requests have not been acted upon within a specified time	P			
REQ.114	Should Send automated notifications to specified users when status change occurs on an agreement	P			
REQ.115	Could Provide support for Erasmus	P			
REQ.116	Should Provide automation and the organization of a dedicated email client inside of the system	P			

## UNIV 1.52: APPENDIX 4

### Template – Contract Addendum for External Data & Systems Service Providers VERSION 06/07/2016

---

*Remove the header above and this section before attaching to RFP, Contract, Purchase Order, etc.*

#### *Justification*

This agreement supports State of South Carolina, Division of Information Security, *Security and Compliance Controls SCDIS-200-2.211, 8.102 and 12.405*, effective for state agencies July 2016.

The content below is a model contract Addendum for USC organization units to include with any Invitation for Bids (IFB), Request for Proposal (RFP), or other formal solicitation documents and procurement/purchasing for services, software, and systems that include Covered Data and Information (CDI, as defined below). This template may be modified in consultation with appropriate university officials, including but not limited to General Counsel, Purchasing, Chief Data Officer, Chief Information Security Officer, and Data Stewards of included data and information. *If CDI is not involved, then this Addendum is not necessary.*

#### *Responsibility for Implementation*

University employees contracting to purchase or otherwise acquire services, systems, and software, including hosted services, which involve university data or business processes are responsible for ensuring this contract addendum is incorporated into the contract between the university and the vendor. .

University Purchasing will facilitate the inclusion of a completed version of this template in solicitations under Section 7B, Special Terms and Conditions; if there are questions about applicability to a particular procurement, the Chief Data Officer, Chief Information Security Officer, Procurement Officer, and/or General Counsel may be consulted.

This template is intended to fulfill, but not necessarily replace, provisions of the State Fiscal Accountability Authority (SFAA) Procurement Compendium, Version 2.0.1 (June 2015; see <http://tinyurl.com/jan8f8g> ), including but not limited to clauses pertaining to Information Security (inclusive of 7B104-1, 7B105-1, 7B106-1), Information Use and Disclosure (7B108-1 and 7B110-1), and Ownership of Data and Materials (7B125-1); see <http://tinyurl.com/jan8f8g> . A Service Provider Security Assessment Questionnaire (04-4027-1), Contractor's Liability Insurance – Information Security and Privacy (7B058-1), and Subcontractor Identification (5030-2) may also be recommended or required.

Note: This Addendum should be used only in conjunction with a contract between the university and a third party. If the university intends to share CDI with a third party but no contract exists between the parties, then please refer to Appendix 3 of this Policy.

*Explanations, Adjustments, and Revisions*

Applicable sections of the following verbiage may be included in contract documents, where appropriate. The Office of General Counsel and the Data Steward(s) of the particular university data involved in the Service Agreement will assist in explaining and/or negotiating terms of this Addendum with the Service Provider.

--- Addendum content begins below this line---

---

**CONTRACT ADDENDUM FOR  
EXTERNAL DATA & SYSTEMS SERVICE PROVIDERS**

This document constitutes an Addendum to the Agreement dated \_\_\_\_\_ between the University of South Carolina (hereinafter "Institution") and \_\_\_\_\_ (hereinafter "Service Provider"). If any of the terms of this Addendum conflict with any of the terms of the Agreement, then the terms of this Addendum shall control.

**Protection of Covered Data and Information**

Service Provider agrees to abide by limitations binding upon the Institution and related to the transmission, storage, access, and disclosure of Covered Data and Information (CDI); this includes various federal and state legislation, regulations, policies, and industry practices.

**Definition: Covered Data and Information (CDI)** includes Personally Identifiable Information (PII) concerning university Constituents, as well as University Data, as defined in [UNIV 1.51](#), and may include paper records, electronic images, data and other information records supplied by Institution, as well as paper records, electronic images, data and other information records the Institution's Constituents provide directly to the Service Provider. Data classified by university Data Stewards as Restricted or Confidential is considered CDI unless specifically exempted by this Addendum. A list of potentially applicable items is located in Enterprise Data Standard 1.04 (Data Classification Level and Potentially Applicable Data Items; see <http://tinyurl.com/h43ojam> ).

**Definition: Constituents** are persons and entities that have a relationship to any organizational unit of the university system, including but not limited to: students (prospective students, applicants for admission, enrolled students, campus residents, former students, and alumni), employees (faculty, staff, administrators, student employees, prospective employees, candidates for employment, former employees and retirees), and other affiliates (including but not limited to board members, consultants, contractors, donors, invited guests, recipients of goods and services, research subjects, and volunteers).

**Acknowledgment of Access to CDI:** Service Provider acknowledges that the Agreement allows the Service Provider and Institution to mutually transmit, store, and access CDI.

**Prohibition on Unauthorized Use or Disclosure of CDI:** Service Provider agrees to hold CDI in strict confidence. Service Provider shall not use or disclose CDI received from or on behalf of Institution (or its Constituents) except as permitted or required by the Agreement, as required by law, or as otherwise authorized in writing by Institution. Service Provider agrees not to access or use CDI for any purpose other than the purpose for which the disclosure was made.

**Return or Destruction of CDI:** Upon termination, cancellation, expiration or other conclusion of the Agreement, Service Provider shall return all CDI to Institution or, if return is not feasible, destroy any and all institutional CDI. If the Service Provider destroys the information, the Service Provider shall provide Institution with a certificate confirming the date of destruction of the data.

**Remedies:** If Institution reasonably determines in good faith that Service Provider has materially breached any of its obligations under the Agreement, then Institution, in its sole discretion, shall have the right to (1) require Service Provider to submit to a plan of monitoring and reporting, (2) provide Service Provider with a fifteen (15) day period to cure the breach, or (3) terminate this Agreement immediately if cure is not possible. Before exercising any of these options, Institution shall provide written notice to Service Provider describing the violation and the action it intends to take.

**Maintenance of the Security of Electronic Information:** Service Provider shall develop, implement, maintain and use appropriate administrative, technical and physical security measures to preserve the confidentiality, integrity and availability of all transmitted and stored CDI received from, or on behalf of Institution or its Constituents. Service Provider shall impose these measures on all subcontractors used by Service Provider.

**Reporting Unauthorized Disclosures or Misuse of Covered Data and Information:** Service Provider shall, within one (1) day of discovery, report to Institution any use or disclosure of CDI not authorized by the Agreement or in writing by Institution. Service Provider's report shall identify: (1) the nature of the unauthorized use or disclosure, (2) the CDI used or disclosed, (3) the identity of the individual(s) or entity that received the unauthorized disclosure, (4) the action(s) that Service Provider has taken or shall take to mitigate any potentially negative effects of the unauthorized use or disclosure, and (5) the corrective action(s) Service Provider has

taken or shall take to prevent future similar unauthorized uses or disclosures. Service Provider shall provide any additional information in connection with the unauthorized disclosure reasonably requested by Institution.

**Indemnification:** Service Provider shall indemnify, save and hold harmless Institution from any loss, liability, damage, claims, costs or judgments the Institution incurs, including Institution's costs and attorney fees, which arise from Service Provider's failure to meet any of its obligations under the Agreement, including but not limited to this Addendum.

**\*\*\*END APPENDIX 4\*\*\***