REQUEST FOR PROPOSAL
Technolutions Slate Portal, Dataset, and Form Development for Carlow University College in High School Program

June 21, 2021, 2021
Carlow University Solicitation No. EAS-2021_01

I - General Information

Carlow University is a small, private, Catholic coeducational university. Founded by the Sisters of Mercy, the University has a strong commitment to social justice, academic excellence, and student success. It has more than 40 undergraduate and 35 graduate and certificate programs. Within six months of graduation, 97 percent of its graduates are employed or enrolled in an advanced degree program. Located in the heart of Pittsburgh's innovation district, it boasts a 12:1 undergraduate student-to-faculty ratio and experiential learning opportunities and internships through regional partnerships. Popular degrees include nursing, education, art, social work, and psychology. Carlow provides transformational learning experiences that empower graduates to become forward-thinking, ethical leaders who give back and make a difference in the world.

Carlow University currently partners with 34 high schools to offer "college in high school" (also known as dual enrollment) credit opportunities through more than 80 class sections to more than 700 students each year. This program requires a level of coordination and management – much of which historically has been performed manually and on paper – that can be streamlined through more automation given the university's recent shift to the Technolutions Slate CRM. The institution has a desire to grow the program to more schools, classes, and students; however, a concerted effort for expansion will be much easier with better and more efficient tools in place for management, interaction, and support.

The CHS program is administered by the Office of Admissions.

II - Partnership Overview

Carlow University needs an experienced Technolutions Slate consultant to build out a portal, multiple datasets, entities, workflows, queries, and forms within the institution's existing Slate instance to support Carlow's robust College in High School (CHS) program.

III - Scope of Work

This would require creation of **multiple datasets and child datasets** to account for:

- Partner high schools
- High-school level contacts (e.g., principals, curriculum directors)
- Courses
- Instructors

The construction of these datasets should include some basic customization, including dataset-scoped field creation, dashboards, lookup, and forms/widgets to add new records to appropriate datasets.

This also requires **form and workflow development** for:

- Initial partner high school application (like a master service agreement) and in-house approval workflow
- Partnership renewal form
- Initial course application (like scope of work under a master service agreement) and in-house approval workflow
- Course renewal form
- Instructor application (to teach an approved course) and in-house approval workflow

Students need to register and pay for one or more courses. Ideally, this is done through one **master registration form** that uses conditional logic to display available courses at the student's high school for a given term. In some respects, this is like "shopping cart" functionality, as costs can differ by course. Behind the scenes of the registration form, the registrations need to be linked to an entity on the student's person record.

These datasets, fields, and entities need to be constructed in a way that will allow them to relate to each other to make dataset dashboards and querying easy. **Queries** (for export and/or Deliver campaigns) would need to be created to capture audiences such as:

- All instructors
- All instructors at a particular school
- All instructors of a particular course, regardless of the school
- All registered students
- All registered students at a particular school
- All registered students in a particular course, regardless of the school

Instructors need an easy way to manage their classes, so an **instructor portal** (requiring login) will need to be developed. This should give instructors the ability to view/download a class roster, by course, by term. This also needs to provide instructors with the ability to securely submit final grades for each of their students.

Carlow would like to engage in dialogue with the chosen consultant to determine best and appropriate next steps and is open to suggestions to improve the process that may differ from the original line of thinking as outlined above. The project manager, one of the institution's Slate captains, does have intermediate knowledge of Slate and would be able to support some simpler and less time-consuming aspects of this build-out if such support would help to meet the desired timeline and/or decrease the overall cost estimate proposed by the vendor.

IV - Timeline

The project can be completed in phases, with a desired project completion date of October 1, 2021. The first aspects of the project (datasets and some forms) must be completed by or before August 1, 2021. The student-facing registration form must be completed by or before September 1, 2021. The instructor portal must be completed by October 1, 2021.

V - Budget

$25,000 - $30,000

VI - Proposal Requirements and Format

The proposal must:

- Be clear and concise
- Use a table of contents for ease in finding necessary information
- Be in PDF format
- Contain the following:

1. **Title page**
    a. Include a title page with signatures of the person or persons required and authorized to legally bind the respondent to the proposal.
    b. Specifically state that the respondent shall complete all services set forth in the proposal within the proposed time limits to the satisfaction of the University.
2. **Cover letter**
    The cover letter shall be on company letterhead and shall contain:
    a. Name and working address of respondent
    b. Name and contact information of the primary company representative to be contacted about the proposal
    c. Date of submission
    d. Brief introduction of the respondent
    e. Brief explanation of why the company is a good fit for Carlow University, acknowledging its mission and audience
    f. Any terms or conditions of this RFP to which the respondent objects and/or does not accept along with any alternatives or further explanation
3. **Designated project personnel**
    The proposal must contain a detailed list of designated project personnel.
    a. Clearly identified respondent liaison/team supervisor
    b. Entire team who will be completing the work identified in this proposal
    c. Each team member's name, title/position, and role as it correlates to this RFP
    d. Each team member's experience relevant to this RFP, specifically regarding Technolutions Slate, dataset creation, portal development, etc.
4. **Itemized scope of work**
    The proposal must contain an itemized scope of work containing:
    a. A detailed list of all services to be provided with succinct explanations
    b. Projected time to complete each service
    c. Projected cost of each service
5. **Timeline**
    The proposal must contain:
    a. Clearly defined and concise timeline
    b. Communication schedule
6. **Samples of work produced by vendor**
    The proposal must contain:
    a. At least three detailed explanations of complex projects performed in an instance of Technolutions Slate for other clients that relate to the items identified in the scope of work in this RFP. At least one explanation must include portal development. When applicable, possible, and permitted, please include visuals.

VII – Fee and Schedule

- State your proposed fee for the services outlined in the Scope of Work, Section III
- Provide project timeline with milestones
- Proposer's fee must be itemized and include breakdown of cost structure (time and effort)

VIII – Acceptance of Proposal

Carlow University reserves the right in awarding the contract to consider the competency, responsibility, and suitability of the Proposer, as well as the services provided. The University further reserves the right to accept or reject any or all proposals, to waive any irregularities or informalities, and to award the contract in the best interest of the University. Neither the University nor any agent thereof on behalf of the University will be obligated in any way by any Proposer's response to this RFP.

The University also reserves the right to allow a Proposer to correct a defect in its Proposal provided that correction of the defect does not alter the amount of the Proposal or the scope of work required under the Proposal.

IX - Proposal Evaluation and Award

All proposals must meet or exceed mandatory requirements outlined in this RFP in order to be reviewed. Proposals must meet the following criteria to be considered:

- Submission by the deadline
- Total cost within the budget range
- Project personnel clearly designated
- Detailed, itemized scope of work
- Detailed timeline for completion of the project

All qualifying proposals will be evaluated utilizing a rubric system with additional consideration given to qualitative, subjective criteria. The information and data for evaluation will come from information supplied with the consultant's proposal from the three references and any clarification information requested by the College he review will be based on the factors set forth in this RFP:

- Minimum criteria as noted above
- Cost effectiveness and value
- Ability to complete project within desired timeframe
- Clear understanding of the project goals
- Innovative approach or methodology to successfully meet project goals
- Necessary qualifications, experience, and resources to undertake the project
- Sufficient training resources and personnel dedicated to the project

IX - Questions

Email questions must be directed to jwmullner@carlow.edu with the subject line "College in High School Slate RFP."