

# **Request for Proposals**

**For**

## **Web Based College Planning Appointment System**

**Rhode Island Student Loan Authority**

560 Jefferson Blvd., Suite 200

Warwick, RI 02886

401.468.1700

**June 11, 2014**

Please note the following critical dates:

RFP Issued	June 11, 2014
Conference call for questions	June 18, 2014
Due date for receipt of proposals	June 27, 2014
Anticipated decision date	July 2, 2014

## Agency Background

The Rhode Island Student Loan Authority (RISLA) was established in 1981 as a public agency of the State of Rhode Island (the “State”) and is an originator of private education loans and the sponsor of the College Planning Center of Rhode Island.

RISLA’s employees are not employees of the State. RISLA does not receive funding from the State and RISLA’s debt obligations are not backed by the State.

RISLA is governed by a six member board of directors, five of whom are appointed by the Governor of the State and the sixth of whom is the General Treasurer of the State.

## Project Specifications & Technical Requirements

The Rhode Island Student Loan Authority provides free college planning and financial aid guidance through the College Planning Center of Rhode Island (CPC). The CPC offers one-on-one counseling to students and parents on all aspects of the college planning process at three locations throughout Rhode Island. The CPC would like to develop an online system to allow families and staff members to book appointments with college planning counselors across all three locations.

### Technologies to be Used

The project should be developed using the Microsoft ASP.NET Framework 4.5, specifically VB.net and Microsoft SQL Server 2012 Technologies. SSL must be used to secure the page transmission between the user’s browser and the web server. All passwords should be one-way encrypted for enhanced user security. The application and database will be hosted on RISLA’s internal servers.

### Site Design

The site should be designed to include a responsive layout that will automatically adjust to varying screen sizes. A custom home page design is needed following the latest design techniques.

### Supported Browsers

The site should be tested in, and support, the following browsers:

- Windows 7 Operating System:
  - Microsoft Internet Explorer 9
  - Microsoft Internet Explorer 10
  - Microsoft Internet Explorer 11
  - The latest version of Mozilla Firefox and Google Chrome
- Windows 8 Operating System:
  - Microsoft Internet Explorer 10
  - Microsoft Internet Explorer 11
  - The latest version of Mozilla Firefox and Google Chrome
- Apple OS-X 10.7 and 10.8 Operating Systems:
  - The latest version of Mozilla Firefox, Google Chrome, and Safari
- Apple iPhone and Apple iPad running iOS7
  - Safari browser

- Nexus Tablets (7" and 10"), and Samsung Galaxy s4 running the latest public versions of Android available:
  - Default browser

### **Data Conversion**

A one-time data conversion will be required before the system goes live. The relevant data will be provided by the CPC in an Excel or CSV format. Customer data as well as past and upcoming appointments will need to be imported.

### **Single Sign On**

The system will require a single sign on framework to be created to allow other RISLA properties to verify access. This single sign on will utilize the student or parent's email address to keep track of multiple logins across other systems. The single sign on system must be able to be integrated with the existing RISLA websites which uses asp.net membership.

### **Student Account Creation**

All students will be required to create an account on the site prior to booking an appointment at the College Planning Center. The site will need to interface directly with the single sign on piece when accounts are created. Basic student information will be captured as well as school and other optional data. Students will be prevented from creating multiple accounts on the system since the students email address will be used as the username. The student should have the ability to update their email address/username if it changes.

Once the account has been created, the student will be automatically signed in and directed to a dashboard page where they can book appointments. Available appointments will depend on student information and administrator-enabled appointment types.

The student will have the option to opt in to receive phone and text messages. To receive text messages a cell phone number will be required. Passwords and other sensitive data will need to be encrypted.

### **Parent Account Creation**

Parents can create an optional account that will allow them to keep track of multiple students without the need to register for multiple accounts. Basic parent information will be captured. The parent's email address will be used and will automatically be added to the single sign on piece. The parent should have the ability to update their email address/username if it changes.

Once a parent account has been created, they will have the ability to add one or more student accounts. If the student accounts were previously created, the parent will have the option to request the student account be linked by entering the student account email address. The student will receive an email with a link to confirm the request.

The parent will have the option to opt in to receive phone and text messages. To receive text messages a cell phone number will be required. Passwords and other sensitive data will need to be encrypted.

### **Parent and Student Account Linking**

A parent account will not be required in order to sign up for a student account but student information will be required for a parent to book an appointment. A parent account can be used to link one or more student accounts. Both the parent account and the student account will have the option to 'Link' to the other account type. This will be done by entering the email address of the parent or student account. A confirmation email

will be sent which will contain a link that allows the parent or student to complete the linking process. A parent may create a student account that is linked to their own account if the student has not already established an account.

### **Parent Dashboard**

The parent dashboard will allow the parent to view their student(s) appointments that are currently scheduled as well as review past appointments. The confirmation details will also be visible. If one of the linked students has missed an appointment the parent will be able to review this information and contact the CPC to unlock the user allowing appointments to be created. The parent dashboard will also include a link to allow the parent to add additional student accounts.

### **Student Dashboard**

The student dashboard will allow the student to view scheduled or past appointments. They will also be able to see the confirmation which will detail the requirements for the appointment. If the student has missed an appointment and needs to contact the CPC to reset the account this should be clearly visible on the dashboard page.

### **Forgot Password**

Since students and parents are only allowed to create a single account, the 'forgot password' process must allow the student or parent to easily reset a forgotten password. The process should email the student or parent a link to the site to reset the user's password. CPC staff members should also have the ability to reset a user's password as a user's request, which will send an email to the user with new login information.

### **Appointment Types**

The CPC staff will be able to create multiple appointment types. Each appointment type will contain optional information, a list of what to bring to the appointment, when the appointment should be booked (time of year, during which year in school, etc.), the designated length of the appointment (30 min, 45 min, etc), and a confirmation messages associated with the appointment.

### **Appointment Request**

Students and parents will be able to request an appointment only after logging into the system or by speaking with a CPC staff member. They will be limited to the number of pending appointments they can have at any given time, as well as the frequency of appointments of a certain type. Some appointments will also be limited based on student high school graduation year. Students and parents that do not show up for an appointment will not be able to schedule another appointment until they call the CPC. Upon calling the CPC, the user's account can be unlocked by the CPC staff.

Available appointments should be visible to users through a daily or weekly calendar view. Appointments can be re-scheduled by either the account user or by a CPC staff member. Staff should be able to re-schedule an appointment up until the appointment time. Students will be prevented from re-scheduling or cancelling an appointment with less than a 24-hour notice. Students will need to call the CPC to re-schedule or cancel these appointments and the system should notify them of this.

Confirmation emails will be sent to the student or parent after an appointment has been scheduled. These confirmation emails will be updatable by the CPC administrators. Confirmation emails will contain an iCal (iCalendar) or similar attachment that can easily be imported into common calendar platforms.

Reminder emails and/or text messages should also be sent to the user 24 hours prior to the appointment if the appointment was scheduled more than 48 hours in advance.

### **Appointment Confirmation**

Each appointment type will require a customizable confirmation page that can be edited by the CPC. The confirmation page should include basic replacement fields for user and appointment information.

Students and parents that do not show up for an appointment will be marked as 'no show' by a CPC staff member. Once a student or parent is marked as a no show, they are not able to schedule another appointment until their account is unlocked by the CPC. If a user is marked as a no show, they are also sent a text message, if available, and an email reminding them that they missed an appointment and will need to call the CPC to re-schedule.

### **Waiting List**

Waiting list functionality will be required. CPC staff should have the ability to turn the waiting list on or off. Students or parents will be able to sign up for this list, if the CPC staff has turned the waiting list on, in the event that the system does not have available appointments on the date they are requesting. The CPC will need to be able to review these requests and schedule the appointments as necessary. If an appointment is scheduled, the system will send out a confirmation email with an attached iCal and/or utilize the cloud based phone reminder system to send out calls or text message reminders to the user.

### **CPC Cancellation**

In the event the office will be closed (bad weather conditions) the CPC will need the ability to have the cloud based phone system automatically call and or text all scheduled appointments for that day. CPC must have the ability to enter a custom message that will be typed into the system with instructions to reschedule the appointment. The system will need to be able to convert the text entered to speech for the cloud based phone system.

### **Date Management**

The CPC staff should be able to control how many appointments are available at any given time for each CPC location. CPC staff should be able to designate by date & time if no appointments can be made at a certain location, only a single appointment can be made at a location, or multiple appointments can be made at a location (with the ability to specify how many during a specific time period). The CPC should be able to set how many appointments are available by each individual date and time or for a range of dates and times by location. The system will also need to provide a way to enter the operating hours of each CPC location. Appointments can only be scheduled during hours of operation when the CPC staff has established appointments are available, and only during times when no conflicts with other appointments exists.

### **Location Management**

Staff administrators will have access to this section which will allow them to add locations and update location specific settings. The administrators will also be able to view and change the staff assignments in this section.

### **Staff Members**

Staff members will have individual accounts in the system so that appointments can be tracked. Each staff member will be assigned to one or more CPC locations by the Staff Administrator. Staff members will identify which location they are at each time they log in. Appointments at each location will be shown to the staff members as well as the waiting list for that location. This user type will be able to mark the appointments as

completed once they have met with the students or parents. CPC requires the functionality of outlook-style notifications to notify them of cancellations and other important events that need real-time notification.

Staff members should also have the ability to create parent and student accounts and book or cancel appointments for users who call in on the phone. For accounts created by a CPC staff member, the system should create an automatic password that is emailed to the user so that they can log into their account in the future. Staff members should have the ability to view booked and open appointments in a daily or weekly calendar view to find open slots for students and parents.

### **Staff Dashboard**

The staff dashboard will allow the staff members to select their location and manage open or waiting list appointments and an easily access the pages for creating new users and appointments.

The staff members will mark the appointments as Completed once they have met with the students or parents. At this time they can also schedule a follow-up appointment if needed. Staff members will be able to view reports detailed below and will have the ability to unlock accounts that were marked as no show. Staff members should have the ability to reset a user's password at the user's request. Staff accounts should have the ability to set a cookie to stay logged into the system.

### **Staff Administrators**

Staff administrators will be responsible for the administration of the staff, locations, hours of operation, and date management. This user type will also be responsible for the content of the confirmation messages that are sent to the students. Staff administrators will be able to view reports below and can unlock student accounts that were marked as no show. Staff Administrators should also have the ability to create a user account and book an appointment for a student or parent. Staff Administrators should have the ability to view booked and open appointments in a daily or weekly calendar view to easily identify an open slot for a parent or student.

### **Staff Administrator Dashboard**

The administrator dashboard will allow the administrators to view the current activity at each location. Links will be provided to manage staff, users, locations, staff assignments and other system functionality. Management pages will be required to handle these functionalities. Staff administrator accounts should have the ability to set a cookie to stay logged into the system.

### **Informational Pages**

Multiple content pages will be required that can be updated by the CPC. These pages will include general information, appointment timelines and when to schedule the appointments as well as guidelines of what to bring to each appointment type.

CPC will require a page that will allow the students to enter their graduation date to determine the best time to schedule each of the appointments based on the appointment types that are set up in the system.

### **Auditing**

A basic auditing system will be required to track all transactions in the system. It will need to audit logins, new users, appointment requests, creations and deletions, parent and student links, administration page updates and all other major functionality.

## **Reporting**

The system will have multiple types of reports including PDF, Excel and HTML. Some reports may require the use of Telerik Reporting and or other third party reporting controls.

### **Staff Activity Report**

This report will break down the number of students or parents the staff at each location has met with. Filters for location, staff member, and date should be included.

### **Student Activity Report**

The student activity report will detail the appointments for users. Filters for location, appointment type and date should be included.

### **Location Activity Report**

This report will show the activity for each location, the number of appointments processed and any no show appointments. Filters should include location, appointment type and date.

### **No Show Report**

This report will detail the no show activity for each location. Filters for location, appointment type, and date should be included.

## **External Software and API Integration**

### **Hub Spot**

The CPC would like to integrate with this existing software package via an API. Relevant student and parent information will need to be sent as appointments are booked.

### **College Board**

CPC will determine if the College Board has an API available. API integration will be required, if available, to determine if the student needs to complete a CSS profile. If an API is not available, the software will provide a link to the College Board website.

### **Cloud Based Phone Reminder Service**

A cloud based phone reminder system will be required so the system can automatically send out reminders via voice (phone calls) or text messages. The voice based reminders should include two-way functionality to allow the student or parent to confirm the appointment during the phone call. The answer selection should be saved back to the system. Other actions might need to be triggered based on cancelation of appointment. Text to voice will be required. System should be smart enough to know the difference between a live person picking up the phone call and a voicemail system.

## **Project Completion**

The system will be deemed completed once RISLA has verified it is working as specified and has been fully functional on RISLA's servers for 30 days.

## Information to Be Provided

Please answer the following questions in the numbered format provided below.

1. **AGENCY INFORMATION.** Please state your firm name and supply contact information for RISLA's primary point of contact at your firm. Supply a brief history and background of your firm. Include the number of full-time employees working at your agency.
2. **EXPERIENCE.** Describe your firm's experience using Microsoft .NET to develop projects of a similar size and scope as described herein. What specific programming features, online tools and applications have your firm developed for other clients? Specify examples of the firm's prior work and provide details about the features developed and how these were used by clients.
3. **QUALIFICATIONS.** Please specify who on your staff will be working on this project, what their role will be, and state their qualifications.
4. **OUTSOURCING.** Will any of the work on this project be outsourced to another firm or contractor? If so, please specify who will do this work and where they are located.
5. **SPECIFICATIONS.** Are there any specifications as listed in this RFP that you believe your firm will not be able to meet? Please explain.
6. **CONSULTING.** Can your firm provide ongoing consulting for this project after project completion?
7. **ON-SITE DEVELOPMENT.** Is your firm able to send developers to work at RISLA on-site during project implementation?
8. **OWNERSHIP.** All programming code and software developed for this project will be property of the Rhode Island Student Loan Authority. Do you agree with this statement?
9. **IMPLEMENTATION.** What kind of time commitment/capabilities will you require from RISLA's IT staff in order for this system to be implemented on RISLA's servers?
10. **TESTING.**
  - a. Would RISLA be able to test a fully functional system on RISLA servers before going into production?
  - b. To what extent will the firm test the website for compatibility with different browsers and operating systems? Will the site be tested for usability at various connection speeds?
11. **AD HOC REPORTING.** RISLA must have the ability to view back end data tables and run ad hoc reporting from the data through reporting software such as Crystal Reports and Microsoft Access. Will this be possible with the system you plan to develop?
12. **REFERENCES.** Please provide three references.
13. **TIMELINE.** Please provide an outline of the development process for the project, including project deadlines. This outline should also include details about how related communications will be handled.
14. **COMPLETION.** What do you project as the estimated completion date for the project?
15. **PRICE.** Please specify the price at which you propose to perform the work specified herein, either as a fixed fee, an hourly basis, or on some other basis. If your proposed fee is not fixed, please state whether you are able to provide a not to exceed price and if so please specify what the not to exceed price is. Please describe any out of pocket expenses you propose that RISLA will reimburse you for and provide an estimate of such expenses. Please also provide an hourly rate for change requests made to the system after project completion. In your pricing, please include any additional set-up and/or monthly charges RISLA may be subject to for the use of the cloud-based notification system.

16. **PERIOD OF VALIDITY.** Each Proposal must include a statement as to the period during which the provisions of its proposal will remain valid. A minimum of 90 days from the Closing Date for Receipt of Proposals is required.
17. **CONTRACTUAL TERMS AND CONDITIONS.** RISLA intends to execute a contract (“Contract”) with the successful Proposer. RISLA may require that the RFP and the terms and conditions attached to it, the Proposer’s response, the best and final offer (if required), and any formal addenda to the RFP be included as part of any contract documents. Proposers must include a sample of a standard contract for similar services as part of their response to this RFP.
18. **INSURANCE.** The Proposer, if selected, must acquire and maintain adequate liability insurance in the form(s) and amount(s) sufficient to protect RISLA, its employees, its clients, and the general public against any loss, damage and/or expense related to its performance under the Contract. The Proposer shall specify in its response to this RFP the nature and limits of all insurance coverage it intends to have.
19. **EQUAL EMPLOYMENT OPPORTUNITY.** The Proposer must include an explanation of its commitment to equal opportunity and affirmative action and include a copy of its equal opportunity and affirmative action policies.
20. **ETHICS.** RISLA and its Board of Directors and staff are committed to maintaining the highest standard of ethics in the awarding of contracts. In accordance therewith RISLA requires that each Proposer certify the following: “Neither the Proposer nor any officer, employee, agent, representative or affiliate of the Proposer has given or offered or shall give or offer to any Board Member, employee, or representative of RISLA or to any family member of the foregoing, or to any business by which any of the foregoing persons are employed, or to any official of the State of Rhode Island who is subject to the State Code of Ethics, any gift, loan, political contribution, reward, or promise of future employment based on any understanding or expectation that the vote, official action, or judgment of the person would be influenced thereby, and, that no officer, employee, agent, representative, or affiliate of the Proposer shall have any direct or indirect non-incident contact with any member of the board of directors of RISLA during any period of time prior to RISLA’s award of the Contract, except at a public meeting of the Board of Directors of RISLA or at a meeting of a subcommittee of the Board of Directors.” Any violation of the foregoing shall result in immediate disqualification of the Proposer.

## Selection Process

Review of the proposals will be undertaken by a committee comprised of staff from RISLA and the CPC. This committee will review all proposals and recommend an individual or firm. Final selection will be made based on the lowest qualified bid price, experience and expertise with similar projects, and a demonstrated ability to provide results.

**A conference call will be held on Wednesday, June 18 @ 10:30 a.m. to publicly address any questions individuals or firms responding to this RFP may have.** If you are interested in participating in this call, please contact Lindie Thibodeau Johnson at [lthibodeau@risla.com](mailto:lthibodeau@risla.com) for dial-in information.

With the exception of a question and answer process and other communications which might be initiated by the RFP review committee in the course of its review, please note that no member or representative of your organization may discuss the RFP or your proposal with any employee or board member of RISLA, the CPC, or

any other Rhode Island state official, office holder, or employee (including general officers, state legislators and their staffs, etc.) or any other party who might reasonably be considered to have any influence on vendor selection until RISLA has announced a decision with respect to this RFP.

**Proposals must be received by RISLA by no later than 4PM EST on Friday, June 27, 2014.** Proposals must be emailed to Stacy Crooks at [scrooks@cpcri.org](mailto:scrooks@cpcri.org) -and- Lindie Thibodeau Johnson at [lthibodeau@risla.com](mailto:lthibodeau@risla.com). You will receive a confirmation email as receipt of your proposal. Any proposals received thereafter the date specified above may, at the discretion of RISLA, be rejected.

RISLA reserves the right to cancel this request for proposals, to reject any and all proposals submitted, to request any additional clarifying information from any proposers, and to negotiate separately with any and all proposers. Issuance of this RFP does not commit RISLA to pay costs incurred in the preparation of proposals and RISLA reserves the right to accept or reject any and/or all proposals, in part or in their entirety.

Rhode Island Student Loan Authority  
Date: June 11, 2014