General Questions

1. Who are the user groups? Students (specific classes/cohorts, etc?)
   a. Administrators (e.g. advisors, faculty, etc)
      i. Yes
   b. Non-university (internship advisors, employers, etc)
      i. No

2. Is historical data, e.g. discussions, important to users? Or are we starting fresh? E.g. Existing competency achievement, current students, etc.
   i. We would be starting fresh.

3. Will you require data migration from CampusLabs OrgSync?
   a. What data needs to be migrated?
      i. We are prepared to start from scratch if data cannot be migrated, but would prefer to have clubs and organizations transferred if possible.
   b. What are the data volumes?
      i. We have approximately 120 active clubs/organizations
   c. What is the quality of the data? Does it require cleansing?
      i. Unsure

4. Do you have any integration middleware (DellBoomi, Mulesoft, or other)?
   i. No.

   For each integration
   b. What kind of data?
      i. n/a
   c. Batch or real-time?
      i. n/a
   d. One way or two way?
      i. n/a

5. Is there a deadline that you need to have a new solution “Go Live” before? Do you need all functionality initially, or can it be rolled out in a phased approach?
   i. August 1, 2020
   b. Are there any other milestones or deadlines if we take a phased approach?
i. Organization staff training begins August 10, 2020. We need to be fully operational by that time to train our staff.

6. Will this solution be used for a single campus, or all 3 CMU Campuses (Main, Bishop, Montrose)?
   a. All 3 campuses.
   b. If all 3 campuses, do you need a separate portal for each campus? Or one portal for all three?
      a. We do not need a separate portal.

7. What information needs to be carried over from OrgSync?
   a. Refer above to question 3.

8. Do you have any design or UI preference? (I.e. a different “look and feel” for different clubs campuses)
   a. No.

9. Can you provide examples of what type of reporting you would need for administrative/staff users?
   a. List of events, list of users (including contact information)
   b. What information would you like visible to students?
      a. Clubs/Organization meetings, events, contact information.
   c. What information would you like visible to staff/faculty?
      a. Same as 9b, except for the appropriate professional staff (Student Life, Residence Life, etc.) who will need to see full details.
   d. Should leaders within each club have more access than individual students?
      a. Yes.

10. Who should be able to create new clubs? Students or administrators?
    a. Administrators. Preferably students will request and then administrators will approve.

11. Do you envision any page variations? E.g. different home pages for different user types?
    a. No.

Event/Meeting Planning + Attendance Tracking

12. Should students have access to clubs at all 3 campuses? Or just at their campus?
    a. Access at all 3 campuses. But we need a way to clearly notate which campus the club or organization is based out of.

13. Are you using any event platforms like Eventbrite?
    a. CMU uses CollegeNet 25Live for event scheduling and University Tickets for online ticketing for events.
Communication with Clubs and Organizations

14. Do you have a preferred method of communication with clubs? Email, in-platform, SMS?
   i. Currently our only method is email. We would like to explore SMS.

15. Should messaging be public or private?
   i. Both options would be preferable.

16. Do you want users to engage by asking Questions and/or utilizing Discussions Forums?
   i. Yes.

17. Do you have an existing moderation process for discussion forums?
   i. No.

18. Should all users be able to see each other? Message each other?
   i. Yes.

19. What security requirements do you have for each user group?
   i. Clubs are open to everyone, so we do not limit.
   b. Are there any aspects of the system that should only be visible to specific user groups?
      i. The only limit is to the leadership group on creating events and other new materials for the club or organization.

20. How should clubs register? Self-registration or through the university? Is there an approval process for new clubs?
    i. Currently there is a form they fill out listing their members and advisor and then goes to approval by staff. This system has worked well. Essentially, it needs to be initiated by students and then approved by appropriate staff.

Location for Important Documents

21. Can students submit documents directly for sharing, or just administrators?
    i. Yes.

22. What type of content would you like users to be able to submit?
    i. Club/Organization constitutions, a variety of Word or PDF documents, pictures & videos.
    b. Is it posted in real-time or is there an approval process?
       i. Real Time

Accurate Calendar Showing Events

23. Are there any limitations on what content/events each user type can view/access?
24. Who determines what events are shown in the calendar?
   i. Everything is available to everyone within the current platform. If an event is marked as “external” it will be added to the greater university calendar.

25. Will these events be uploaded by staff, or integrated with external university calendar?
   i. Events are created by student groups, and then approved by staff. If an event is marked as “external” it will be added to the greater university calendar.

**Ease of Use for Students & Professional Staff**

26. How would you like users to access the platform?
   a. Link from your website?
      i. Yes.
   b. Link from your software product?
      i. No.
   c. Single Sign-on?
      i. Yes.
   d. Public-facing view?
      i. No.
   e. Social Sign-on: Facebook, Google, Twitter...?
      i. Yes.
   f. Do you want users to Self-register?
      i. No.

**Customer Service**

27. How would you like students to obtain support from the platform? Via chatbot, call center, direct chat with administrators?
   i. As many options as possible, most preferably chatbot.

28. How many total applications do you process a year? How many total students are enrolled at Colorado Mesa?
   i. Undergraduate: Fall 2019 enrollment of 9,239. Process approximately 10,000 undergraduate applications per year.
   ii. Graduate: Fall 2019 enrollment of 134.
   iii. Total Enrollment: 9,373.

29. We have moved to a remote work-situation which would make some of that (hard copies submission) challenging for us. Digital submission would be unproblematic, but some of the physical aspects of putting together a hard copy submission might not be possible in time to ship to you by March 27th. Please let us know how you would like us to proceed.
   a. The University will accept electronic response but prefers to receive the hard copy submission as outlined in the RFP.