## Appendix A: Course Evaluation Software RFP Software Requirements

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| # | NKU Software Requirements | Vendor Response |
| Survey Set-up and Design |
|  | Robust / flexible levels of administrative access to set-up and design process |  |
|  | Automated, cumulative process for creating surveys, with inputs from technical/administration staff/instructors |  |
|  | Fully customizable surveys |  |
|  | Flexible scale creation (e.g. 3-, 5- and 7-pt, scales) |  |
|  | Allow grouping of questions under categories such as course, instructor, close-ended, open-ended questions |  |
|  | Question bank (QB) allows for adding, storing & sharing questions by administrators and instructors |  |
|  | Create categories/tags in QB for instructional formats/departments/disciplines |  |
|  | Create templates per instructional formats that can be reused |  |
|  | Generate surveys for co-taught/team-taught/modular courses |  |
|  | Ability to create University, College, Department and Program level questions |  |
|  | Ability to assign questions/evaluations based on course instructional format (online, face to face, hybrid) |  |
|  | Instructors easily add custom survey questions for their courses |  |
|  | Instructor can create & manage mid-semester evaluations |  |
|  | Generate faculty peer reviews |  |
|  | Generate faculty self-evaluation surveys  |  |
| Survey Distribution and Communications |
|  | Describe your general approach to communications |  |
|  | Notify instructors evaluation has been created, give them a preview link, along with setting details |  |
|  | Notify students when evaluation opens/closes |  |
|  | Student can easily see which evaluations they have to take, which are complete, which are saved |  |
|  | Ability to save & complete later, and cancel |  |
|  | Ability for partially completed surveys to be accounted for in overall responses for questions that were completed |  |
|  | Remind students at set intervals (only for open uncompleted evaluations) |  |
|  | Ability for a student to “opt-out” of surveys within the survey so the response is captured |  |
|  | Customizable notification templates |  |
|  | Ability for notifications and reminders sent over multiple media formats:* Canvas (LMS)
* Email
* Text Notifications
* NKU Student Portal
* NKU Mobile Application
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| Reporting and Analytics |
|  | Out of the box reports include aggregate reports; longitudinal reports on course, instructor and department |  |
|  | Ability to create NKU custom reports |  |
|  | Please describe your capabilities for flagging/editing/redacting student comments deemed hostile or discriminatory |  |
|  | View of aggregate as well as individual responses for a course and for a department's courses |  |
|  | Instructors access real-time response numbers and summary reports |  |
|  | Allow various levels of access (deans, department admins, etc.)? |  |
|  | Please describe your capabilities to allow for importing of historical data |  |
|  | Please describe your capabilities for exporting data out of the system |  |
|  | Ability to retain survey results for 10 years  |  |
|  | Ability to import 3 years of data from Digital Measures |  |
|  | Standard and Customizable Dashboards |  |
|  | Usage reporting by user and function |  |
| System Administration |
|  | Feeds course catalog data and roster data into system |  |
|  | System Administrators can set/view via dashboard configurations, status of evaluations, and reports |  |
|  | Site Branding for NKU Look and Feel |  |
|  | Distributed administrator account privileges, hierarchy |  |
|  | Granular permissions for who may see reports within the college hierarchy. |  |
|  | Ownership of data to include student identification data and ability for administrators to export all imported data.  |  |
| Data and Records Management |
|  | * Automatic process for purging and archiving.
* Manual process for purging and archiving.
* Storage capacity limits of the CRM system.
* Identify and merge possible duplicate records.
* Archiving records and future access for information and reporting.
* Ability to incorporate commercial imports, such as test score loads or name purchases from College Board, ACT, GRE, GMAT, TOEFL, IELTS, NRCCUA or others.
* Ability to import information from any of our external data sources
* Ability to edit student records in CRM system with frequency.
* Allow imports to go through a matching process with current records in CRM.
* Exchange edits to records and information back to the SIS, SAP.
* Recognize and prioritize multiple addresses (permanent, temporary, etc.), phone numbers (home, cell, etc.), email address and other data. Referred to at NKU as dominance rules.
* Employ a workflow so that inquiries, communications, operational actions, approvals and transactions may be routed to the appropriate person(s) or campus office(s) based upon complex business rules.
* Modified records to cease communications automatically or manually.
* Data is fully accessible for reporting purposes.
* Allow new or added data elements to be easily added and used as part of data import/export.
* Allow custom data fields to be automatically available in reporting.
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| Implementation, Training and Continuous Support |
|  | **Implementation*** Provide a detailed implementation timeline. (Should reflect all aspects through go-live.)
* Outline the staffing and composition of the implementation team comprised of NKU and vendor staff, vendor roles (skillset, responsibilities, past implementation experience, and availability to NKU), and proposed hours required for successful CRM implementation.
* Identify any third party vendors involved in your implementation strategy and describe these relationships. (Please detail any associated licenses, fees, costs, or other implementation requirements or equipment – fees and costs should be shown in the Cost Proposal).
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|  | **Training*** Describe your training model. Include typical training schedules and how it fits into the implementation process.
* Are there self-help options or training materials provided for clients to reuse when new users are introduced to the system?
* How often are training programs available for functional end-users and technical support personnel? If there is a cost associated with annual training options please describe.
* Are there training programs remote, on-site, or a combination of both methods?
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|  | **Continuous Support*** Describe your recommended strategy for NKU staffing needs to properly support your product after implementation to ensure product success.
* Describe your functional end-user support model. What are the hours of availability? What type of support is available (web, email, phone, chat, built in help features, FAQ)?
* Describe the technical support available for administering your system. What are the hours of availability? What type of support is available (web, email, phone, chat, built in help features, FAQ)?
* What is the average response time for system issues?
* Explain what type of documentation or help system is included.
* Do you support user groups or forums for your system? Do they operate independently from your company? Are they national? Are they regional?
* What services or events do you offer clients to maximize or leverage the features/functionality of the solution?
* How do you manage and organize on-going contact with your clients? Please describe.
* How do you obtain and prioritize feedback for changes or enhancements to your solution (i.e. user groups, events, customer service, company representatives, etc.)?
* Describe your service level agreement.
* Please provide a copy of your standard maintenance contract.
* Where is your primary support location and what is are the hours of service?
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