REQUEST FOR PROPOSALS
#67-0165

Room Scheduling System

RFP Issue Date: <u>November 7, 2016</u>

RFP Due Date: <u>December 15, 2016</u>

Contact purchasing@uchastings.edu

Room Scheduling System

Purpose

The purpose of this Request for Proposals (RFP) is to secure the following:

- UC Hastings College of the Law (hereinafter called the College) seeks a comprehensive online event scheduling software system that will allow the ability to reserve rooms for meetings and events, resource management, online reservation requests, and provides analysis of space utilization through reports and statistics. A cloud based system is preferred. The ability to download directly from Banner or Colleague and update the College's internal calendar and schedule of classes in the appropriate classrooms is essential.

Context

Founded in 1878 as the "law department" of the University of California by Chief Justice Serranus Clinton Hastings, UC Hastings College of the Law was established by the California Legislature with its own Board of Directors. With the exception of the degree-granting authority held by the UC Board of Regents, all other aspects of the College are operated independently under the oversight of the UC Hastings Board of Directors. UC Hastings is the oldest public law school in California, and the only stand-alone, public law school in the nation.

UC Hastings' reputation for academic excellence, its formal affiliation with the University of California (UC), and its location in San Francisco's downtown Civic Center are major factors contributing to the overall strength of the Institution.

UC Hastings is located in the **heart of San Francisco's Civic Center.** Strategically situated amid a complex of government activities and cultural attractions, Hastings stands astride two blocks of McAllister Street:

- The Tower (100 McAllister St.)
- Snodgrass Hall (198 McAllister St.)
- Mary Kay Kane Hall (200 McAllister St.)
- Hastings Parking Garage (376 Larkin)

Request for Proposals – Room Scheduling System – 2016

Scope of Work

A. **BACKGROUND**

The College currently uses Astra Schedule to make class scheduling, room reservations and to populate our public-facing events calendar. Users look for, and request spaces via Astra Room Reservation Schedule. Once an event is confirmed in Astra, it is manually inputted by the College Events Center into the UC Hastings Events Calendar. Requests for event services, such as recordings and facilities is handled through Astra, as well as separately via email. The College seeks to reduce this redundancy and eliminate the possibility of user error, double-booking of spaces, etc.

B. **MANDATORY TECHNICAL REQUIREMENTS**

1. **The software solution must be compatible with other UC Hastings Systems:**
   a. Cloud-based system is required.
   a. System must offer complete academic data integration between our academic and event scheduling systems, as well as our student information systems, to include but not limited to Shibboleth, Active Directory, Colleague running on Unidata and PeopleSoft.
   b. System should integrate natively or through API with existing classroom recording hardware/software, including Panopto.
   c. Database must be OBDC compliant.
   d. WebServices API must be fully documented and provided at no additional cost.
   e. Native integration or APIs capable of communicating with Salesforce and OWA.
   f. Vendor must provide SaaS deployment with Test & Production instances at all times, with no outsourcing to 3rd parties.

2. **The software solution must meet UCOP security standards and allow for user authentication:**
   a. Provide the ability to have groups and/or tiers of UC Hastings-recognized authenticated access and authority to the scheduling functions and data (administrator, super user groups, view only, edit, create, delete, book tentatively).

b. Ability to self-define "statuses" for process management, workflow management, and space override management (i.e. Affiliated Group vs. External Group, waiting for contract vs. confirmed-contract approval).

c. Must permit users to belong to multiple groups/tiers.

d. Permit multiple users to enter, approve and make changes at the same time (multiple persons with the same security access-level concurrently).

e. Provide audit trail to determine date, time, action and user who made the change(s) to all events.

f. Cloud-based systems must conform to UCOP's cloud computing policies.

C. GENERAL REQUIREMENTS

1. The software solution must have the basic functionality in its design:

a. Automatic download from Colleague to assist in identifying room availability, which will also update the internal calendar.

b. Allow for end-user-configured preferences to assign specific meeting patterns and rooms to sections.

c. The vendor's software must be a web or cloud based product that utilizes common web browsers (Edge, Chrome, Firefox, and Safari) with the most recent versions supported, and allow for responsive design.

d. Meets 508 accessibility standards.

e. Must provide a graphical drag and drop scheduling interface and must prompt user for automatic adjustment of all scheduled services (i.e. event moves forward ½ hour, drag and drop event into the new/time space and all appropriate adjustments are made).

f. Ability to color code "event view" labels by status and event type.

g. Ability to sort reservation by a variety of labels (i.e. organization, department, external, tentative, etc.)

h. Must be able to re-use contract and event information (enter once, use many) including specifics from either past or current events (i.e. time, set-up, etc.)

i. Events should permit the association and attachment of documents to the event (i.e. minutes, agenda, notes, special instructions, attendee lists, etc.)

j. Provide work flow capability that includes automatic email notification. Must provide e-mail notifications to "end-users" to support actions (i.e. confirmation notices, future event notices, that should ideally be customizable).

k. Permit alerts on items and dependencies.

Request for Proposals – Room Scheduling System – 2016

l. When a meeting is cancelled/deleted, system automatically cancels all resources from meeting and makes them available for other meetings. Administrator must be able to set permissions to control who can delete meetings.

2. **The room reservation system should allow for the following:**
    a. **Room attributes:** Manage and store room capacities, attributes, details and schedules. Permit images (pictures, diagrams) of room inventory, rental equipment, and room set-ups. Must be able to create self-definable and/or unnamed spaces.
    b. **Room Search functionality:** allow the user use multiple attributes in the search criteria to find potential space and also identify conflicts for possible resolution (i.e. setup type, capacity, room type, etc.).
    c. **Administrative Control of Rooms:** Administrator may permit view of all spaces or hide any space from general access, and restrict space based on building or room. Administrator has the ability to block rooms, take them offline and reassign rooms.
    d. **Room Services:** Must provide the ability to create resource packages from individual items (i.e. AV Packages vs. just a microphone). Also can be used for catering packages. Must be able to self-define services, service types, resource categories and notes. Must be able to support service order only requests.
    e. **Room Charges:** Must provide for room charges, services charges and customized discounts at line item level.
    f. **Multiple Rooms:** Ability to reserve multiple rooms, resources and services in either same or different locations with single meeting event.
        i. The reservations should be linked together and managed as an "event group" for creation, modification (editing) or cancellation.
        ii. If a user has reserved multiple rooms and then cancels, they then have the ability to remove hold on all rooms included in the original request.
        iii. Ability to delete multiple room reservations by deleting the associated event.

3. **Online Request System and Calendar should possess the following functionality:**
    a. **Room Requests**: System must be able to accommodate any number of online room request forms to accommodate different space type, resource availability or room ownership needs
        i. Provide ability for users to see space availability on the web

Request for Proposals – Room Scheduling System – 2016

    ii. Each room request form must be able to have defined security controls such as cut-off times for room, appropriate use of rooms and separate times for resources

    iii. Defined request availability by date range

    iv. Provide ability to include a set-up and tear-down window of time for back-to-back events either as default by room or ad hoc.

    v. Individualized help instructions based on web-form

b. **Room Services:**

    i. Allow the user to specify room set-up type (when applicable).

    ii. Allow the end user to submit work orders, AV requests, prep notices, notices of room clean-up, etc.

    iii. Allow the user to make additional requests through an unlimited notes feature.

    iv. Allow the user to attach notes, including event agenda, room picture and/or room layout images to individual spaces.

    v. Schedule multiple times for services (i.e. catering, personnel, etc.)

    vi. Able to assign resources to both courses and events.

c. **Events Scheduling / Calendaring:**

    i. End users must be able to view their open requests, make modifications and edits within defined cut-off times for event and/or resources online.

    ii. End users must be able to submit request for space as patterned events as well as random dates. Support calendaring of reoccurring events to the website without double entry.

    iii. Including the ability to categorize events by venue or event type. Must be able to exclude events.

    iv. Have the ability to set single day, various types of recurring and non-pattern bookings for room request.

    v. Provide for multiple tentative reservations for a given space.

    vi. Must have the ability to alter a series of bookings/reservations and have those changes reflected in each occurrence.

    vii. Ticketing system for free and paid events preferred.

d. **Functionality with other services:**

    i. Individual calendar links must be able to be created by Event Type, Group Type or Venue

    ii. End-users should be able to add a single event or all re-occurring events to their calendar via an .ics file.

    iii. End-users should be able to add events to various social networking sites including Facebook, Twitter from the College Calendar.

    iv. End-users should be able to push events to Outlook calendar and to Salesforce.

4. **Reporting Capabilities:** System reports must be produced within the purchased environment without requiring extensive technical expertise or the use of a 3rd party reporting tool (standard and built-in query builder), and should possess the following:
    a. Reports must be available thru a standard web interface.
    b. Provide a robust way to create and modify reports, as well as create custom reports.
    c. Must include the ability to view summary results and drill-down to individual reservations, if necessary (example: sum result of monthly room use is X, and the ability to quickly click thru all reservations that produced the sum total in a single interface)
    d. Ability to dynamic sort data elements in an existing report, add data elements, delete data elements, performing grouping, sums, and filtering, and to do so from various security profiles, not just administrators.
    e. All reports including confirmations and contracts can be exported out to .xls, .rft, .html, xml, and .pdf.
    f. Reports must include standard operational, statistical and financial report.
    g. Ability to print individual room usage schedules per day and per week and print entire building schedules per day and per week.
    h. Ability to print reports by function (example: all AV requests).
    i. Ability to run a tentative commitment report by date and location.
    j. Ability to provide detailed sales reports, i.e. group, group types, categories, resource item, etc.

5. **Documentation and Training Support**
    a. Provide updated documentation for systems administrators and general user help and assistance.
    b. Provide updated documentation with the release of any software updates or upgrades.
    c. Provide updated documentation for systems administration and general user help and assistance when updates and upgrades occur.
    d. Provide end-user access to tech support and customer website as part of the standard annual software agreement.
    e. Have an active and coordinated user group community to keep users up to date with software features.
    f. Must provide software upgrades including major releases for purchased versions within the fee structure of the annual software maintenance fee.

Request for Proposals – Room Scheduling System – 2016

UC Hastings Contact Information

The primary contacts for this process are:

>**Camilla Tubbs,** Associate Dean for Library and IT
>tubbsc@uchastings.edu
>
>**Darryl Sweet**, Director of Business Services
>purchasing@uchastings.edu

Tentative Schedule & Milestones

RFP posted at http://sites.uchastings.edu/purchasing/current-bids-fy-2016-2017/	11/7/16
Questions due to purchasing@uchastings.edu	11/18/16 by 4:00 pm PT
Responses from UCH posted at http://sites.uchastings.edu/purchasing/current-bids-fy-2016-2017/	12/1/16 by 4:00 pm PT
RFP due to purchasing@uchastings.edu	12/15/16 by 4:00 pm PT
Evaluation period	12/15/16 – 1/15/16
Target award date, subject to approval by Board of Directors	TBD

Guidelines for Submittal

To appropriately evaluate each design firm's capabilities, responses are to be tendered according to the guidelines listed below. Award will be made based upon the total response to the RFP. The College will determine the response or responses that represent the best interests of the College.

Each firm is to address their expertise in fulfilling the UC Hastings Scope of Work included in this RFP. The proposal shall clearly address all information requested in this RFP, and in any addenda. Structure your response as follows:

1. **Executive Summary**
   - Introduce your firm, including size, location, philosophy, and areas in which the firm excels.
   - Provide names, resumes, certifications and specialties of the personnel who would be assigned to this project, and indicate what their proposed role would be in this project.

2. **Expertise**
   - Describe specific techniques to be employed in preparation of the requested

Request for Proposals – Room Scheduling System – 2016

services. Outline anticipated work plan and schedule.

- Provide a list of recent projects of similar size and scope (including appropriate customer and contact information for individuals who may be contacted to evaluate completed work), and the outcome of the projects. Be sure to include any UC campuses or other public agencies for which you have provided these services.
- Provide a limited representation of illustrative materials such as graphics and page setups.

3. **Compensation**
   - Provide a total fee proposal with clearly identified supporting details. The fee proposal should be inclusive of any license fees, hourly billing rates and estimate of time and work effort required, and any estimated reimbursable expenses not covered by fees.

Due Date

Your completed proposal is due (via e-mail) by **December 15, 2016, 4:00 p.m. PT,** to: purchasing@uchastings.edu

Questions and clarifications concerning this Request for Proposals should be sent in writing via e-mail to purchasing@uchastings.edu referencing the appropriate RFP section and page number. Written responses to all submitted questions will be provided to all queries during the Q&A phase.

Confidentiality

All information concerning all parties referenced herein or their respective businesses and operations, which is directly or indirectly furnished or made available under or by virtue of the existence of this RFP and which is not generally available to the public shall be treated as confidential and proprietary. All parties shall take all reasonable precautions to assure that no such information is used, disclosed, duplicated, or distributed by them or any of their employees or agents for any purpose other than their performance hereunder.

Agreement Term

It is the intent of UC Hastings to enter into an agreement with a single firm. A standard UCH agreement is attached for reference as Exhibit A. Actual agreement may differ slightly.

Other Conditions

Submission of a proposal in response to this RFP does not commit UC Hastings to pay any costs incurred in proposal preparation or submission, or to enter into a contract with any Consultant for

Request for Proposals – Room Scheduling System – 2016

any services. UC Hastings may reject any or all proposals at UC Hastings' sole discretion. Failure to comply with all the terms and conditions of this RFP may result in its rejection.

Incorporation of Proposal into Contract

This RFP, the awarded firm's proposal, and all other representations made by the firm, will be incorporated into any and all contract agreements between the firm and UC Hastings.

Award of Contract

Award will be based upon the response that is determined to be in the best interests of UC Hastings, as determined by the College. Initial evaluation will be based upon a combination of company information, expertise and the cost proposal for the project. The College may, in its discretion, require a finalist round or round(s) to evaluate and assist in making final decision.

EXHIBIT A

SAMPLE AGREEMENT

AGREEMENT
BY AND BETWEEN

UNIVERSITY OF CALIFORNIA
HASTINGS COLLEGE OF THE LAW

AND

_____

THIS AGREEMENT ("Agreement"), made and entered into as of __ by and between Hastings College of the Law, hereinafter called "Hastings", and __, hereinafter called "Consultant", is for providing consultant services to Hastings as follows:

I. SCOPE OF SERVICE RENDERED

Hastings hereby retains the Consultant to perform the following professional services:

II. TERM OF AGREEMENT

The term of this Agreement shall be from __ to __ or until completion of the Services are to the satisfaction of Hastings, or unless terminated by the occurrence of any one or more of the following, whichever is sooner:

   A. Completion of the performance of the Services, which will be performed during regular business hours; or
   B. Receipt by Consultant of Hastings's written notice of its intent to terminate this Agreement within ten (10) days, which termination may be for any reason or no reason, in Hastings's sole discretion; or
   C. Within twenty-four (24) hours of written notice to Consultant at any time in the event the Services are not being performed to Hastings' satisfaction and otherwise in accordance with this Agreement.

The parties acknowledge and agree that this Agreement is a so-called "at will" Independent Consultant relationship, terminable upon written notice by Hastings. Upon expiration or termination of this Agreement for any reason, Consultant shall not have any executory obligations to Hastings; and Consultant shall be entitled only to such compensation as shall

have accrued to Consultant for fees or expenses actually incurred by Consultant for completed and accepted Work provided up to but not including the effective date of termination.

III. COMPENSATION

The cost of Services shall be a lump sum not exceed

Hastings agrees to standard, typical and reasonable reimbursable expenses not to exceed.

IV. CHANGES IN THE WORK

In its sole and absolute discretion, Hastings may order changes in the scope of the services, or Hastings may order additional services outside the scope of service. Consultant shall not make any change in the work or be entitled to any adjustment of Contract Term or Compensation except as provided in a written Change Order or Addendum to this Agreement signed by Hastings.

V. PAYMENT

Hastings will pay Consultant monthly upon receipt of itemized billing invoices. The charges for reimbursable expenses will include copies of itemized receipts supporting the expenses.

All invoices will reflect Consultant's taxpayer identification number and Consultant's license number addressed to:

David Seward
Chief Financial Officer
University of California
Hastings College of the Law
200 McAllister Street
San Francisco, CA 94102
(415) 565-4710

 TERMINATION CLAUSE

In the event Consultant fails to carry out or comply with any of the terms and conditions of this Agreement, Hastings reserves the right to demand correction of any breach or default within ten (10) days of notice to Consultant. In the event Consultant fails to correct the failure or default within the specified period, Hastings may terminate the Agreement without additional notice. Failure to terminate this Agreement is not to be deemed a waiver of the breach or default.

VII. EXAMINATION OF RECORDS

Request for Proposals – Room Scheduling System – 2016

Hastings and auditors of the State of California shall have access to and the right to examine and audit any books, documents and papers and/or records of Consultant involving transactions related to this Agreement for a period of three (3) years following its termination. These documents must contain adequate justification of the charges made to Hastings.

VIII. COORDINATION

Consultant, in performing services described herein, will coordinate and report to:

University of California
Hastings College of the Law
200 McAllister Street
San Francisco, CA 94102
(415)

Consultant is to immediately inform __(or designee) of any unusual conditions or events that relate to, or may affect, the work to be performed under this Agreement. Consultant agrees to meet on a regular basis with Academic Dean Marshall to review the progress of the work to be performed by Consultant and any unanticipated problems or issues.

IX. SERVICE PERFORMANCE SCHEDULE

It is understood that time is of the essence of this Agreement and Consultant is bound by all of the time limits imposed by virtue of this Agreement. Consultant agrees to the following service performance schedule:

The Services to be performed under this Agreement shall commence upon written authorization to proceed and be substantially completed within the time frame established between Hastings and Consultant.

X. INSURANCE AND INDEMNIFICATION

Hastings and the State of California shall not be liable for any accident, loss, injury (including death) or damages, happening or occurring during the performance of this Agreement, to persons and/or property, caused in whole or in part by the intentional or negligent acts or omissions of Consultant, and Consultant will fully indemnify and protect Hastings and the State of California from and against same. In addition to the liability imposed by law upon Consultant for damage or injury (including death) to persons or property by reasons of intentional or negligent acts or omissions of Consultant, his/her agents, servants, or employees, which liability is not impaired or otherwise affected hereby, Consultant hereby assumes liability for and agrees to hold Hastings and the State of California harmless and indemnify Hastings for any expense, liability, or payment by reason of any damage or injury (including death) to persons or property suffered or claimed to have suffered through any intentional or negligent acts or omissions of

Request for Proposals – Room Scheduling System – 2016

Consultant, its subcontractors, or anyone directly or indirectly employed by either Consultant or its subcontractors.

Consultant will maintain in force at all times during the term of this Agreement, Workers' Compensation (statutory limits) in the amount of $500,000; and Employer's Liability, Comprehensive General Liability with bodily injury limits and property damage limits of $1,000,000 each occurrence and in the aggregate; and Auto Liability in the amount of $500,000 and Professional Liability in the amount of $1,000,000 subject to a deductible of $25,000. Such insurance policies shall name Hastings as an additional insured and provide for notification to Hastings thirty (30) days prior to termination or restrictive amendment. Consultant shall furnish a Certificate of Insurance to Hastings as evidence of the required coverage. All insurance required under this Agreement is to be provided by carriers with a Best rating of A-10 or better. Carriers must also be California admitted companies listed as such by the Insurance Commissioner for the State of California.

XI. EXCUSABLE DELAY

Consultant shall not be held responsible for delays in the performance of this Agreement caused by strikes, lockouts, labor disturbances, acts of government, acts of nature (e.g. earthquake) or other causes similar to the foregoing which are beyond the control of and are not the fault of Consultant. Provided, however, that Consultant shall, within five (5) days after the occurrence of cause or causes of delay, request an extension of time from David Seward. Such request shall be in writing and shall state in detail the reasons for the delay, which will prevent timely performance. If Hastings finds that such cause or causes of delay exist, it may either grant Consultant an extension of time equal to the delay resulting from such cause or causes, or, at its option, terminate this Agreement.

XII. APPLICABLE LAW

All pertinent laws of the State of California shall govern this Agreement and become a part hereof.

XIII. ENFORCEMENT OF AGREEMENT

Any controversy or claim arising out of or relating to this Agreement, or a breach thereof, shall be settled by final and binding arbitration in San Francisco, California, under the auspices of the American Arbitration Association, in accordance with the Commercial Arbitration rules. Judgment upon any award rendered by the arbitrator may be entered in any court having jurisdiction. Any provisional remedy, which would be available from a court of law, shall be available from the arbitrator, to the parties of this Agreement pending arbitration.

The arbitrator shall determine which is the prevailing party and shall award that party its costs and fees. Costs and fees mean all reasonable pre-award expenses of arbitration, including the arbitrator's fees, administrative fees, witness fees and attorneys' fees.

Request for Proposals – Room Scheduling System – 2016

XIV. NOTIFICATION

All notices required or permitted under this Agreement shall be in writing and may be served by depositing the same in the United States mail, postage prepaid and registered, and addressed to the parties at the addresses set forth below, or to such other address as either party may designate in writing from time to time.

If to Hastings: If to Consultant:

David Seward, CFO
University of California
Hastings College of the Law
200 McAllister Street
San Francisco, CA 94102

Any change of address of Consultant shall immediately be communicated in writing to Hastings.

XV. NONDISCRIMINATION

During the performance of this Agreement, Consultant shall not discriminate unlawfully against any employee or applicant for employment on the basis of race, religion, color, national origin, ancestry, physical or mental disability, medical condition (cancer-related or genetics), marital status, age, sex or sexual orientation.

XVI. DRUG-FREE WORKPLACE CERTIFICATION

Consultant certifies compliance with Government Code 8355 by signing and incorporating the attached Drug Free Workplace Certification Exhibit into the Agreement.

XVII. W-9 Form

As required by Hastings, Consultant must complete a W-9 form attached hereto and shall be submitted together with this Agreement for full execution.

XVIII. CONFLICT OF INTEREST

Consultant will not hire any employee of Hastings to perform any service covered by this Agreement.

Consultant affirms that to the best of Consultant's knowledge, there exists no actual or potential conflict between Consultant's family, business or financial interests and the services under this Agreement and in the event of any change in such circumstances will inform Hastings of any questions regarding possible conflicts of interest that may arise as a result of such change in circumstances.

Request for Proposals – Room Scheduling System – 2016

XX. NON-ASSIGNMENT

This Agreement is not assignable or delegable by either party.

XXI. NON-RESPONSIBILITY OF THE REGENTS

The Regents of the University of California, a public corporation, is not a party to nor is it financially responsible under this Agreement.

XXII. ENTIRE AGREEMENT

This Agreement and the exhibits hereto, constitute the entire agreement between the parties and no party shall be liable or bound to the other in any manner except as set forth in this Agreement.

Dated:_____, 2016   Dated:_____, 2016
UNIVERSITY OF CALIFORNIA
HASTINGS COLLEGE OF THE LAW   (Consultant)

By:_____   By:_____
    David Seward   Signature
    Chief Financial Officer

    _____
Approved As To Form:
Dated:_____

_____
Elise K. Traynum
General Counsel

Request for Proposals – Room Scheduling System – 2016