



UNIVERSITY OF
TORONTO

Request for Proposals

For

A Learning Management Engine and Related Services

Request for Proposal No.: **UOT201615062**

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PART 1 – INTRODUCTION

1.1 INVITATION TO PROPONENTS

This Request for Proposals (“RFP”) is an invitation by the Governing Council of the University of Toronto (the “University”) to prospective proponents to submit Proposals for the provision of a **Learning Management Engine and related services**, as further described in Part 2 – The Deliverables (the “Deliverables”).

Established in 1827, the University of Toronto is Canada’s largest university with approximately 80,000 students, 17,200 faculty, staff and librarians, and almost 500,000 alumni active in every region of the world. The University ranks among the top major research universities globally, operates three major campuses in the greater Toronto area and is affiliated with 20 teaching hospitals. The University is one of the largest employers in the Toronto region and contributes almost \$15.7 billion to the Canadian economy every year.

1.2 UNIVERSITY CONTACT

All communication concerning this RFP shall be directed in writing by email to the University Contact:

NAME: Aneel Lubhaya
TITLE: Senior Procurement Officer
E-MAIL: aneel.lubhaya@utoronto.ca

Only the individual named above, or their authorized representative may speak for the University with respect to this RFP. The University advises that a Proponent who seeks to obtain information, clarification or interpretation from another University official or employee uses such material at the Proponent’s own risk and that the University shall not be bound by any such representations.

Proponents may submit questions and/or communications regarding this RFP in writing by email as per the timelines in Section 4.1 Timetable and as noted in Section 4.3 Communication.

1.3 TYPE OF CONTRACT FOR DELIVERABLES

The Successful Proponent will be requested to enter into negotiations for an agreement with the University for the provision of the Deliverables in the form attached as Appendix A in the RFP. It is the University’s intention to enter into the Form of Agreement based on Appendix A with only one (1) legal entity. The term of the Agreement is to be for a period of three (3) years, with an option in favour of the University to extend the Agreement on the same terms and conditions for two (2) additional terms of up to one (1) year each. It is anticipated that the Agreement will be executed on or around late 2016 or early 2017.

The University reserves the right in its sole discretion to defer any Agreement or to cancel this RFP at any time before or after closing without providing reasons for such cancellation.

1.4 NO GUARANTEE OF VOLUME OF WORK OR EXCLUSIVITY OF CONTRACT

The University makes no guarantee of the value or volume of work to be assigned to the Successful Proponent. The Agreement to be negotiated with the Successful Proponent will not be an exclusive contract for the provision of the described Deliverables. The University may contract with others for the same or similar Deliverables to those described in the RFP, or may obtain the same or similar Deliverables internally.

1.5 AGREEMENT ON INTERNAL TRADE

Proponents should note that procurements falling within the scope of Chapter 5 of the Agreement on Internal Trade are subject to that chapter, but that the rights and obligations of the parties shall be governed by the specific terms of each particular tender call. For further reference, please see the Internal Trade Secretariat website at <http://www.ait-aci.ca/agreement-on-internal-trade/>.

1.6 ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT

The University is committed to accessibility as expressed in the Accessibility for Ontarians with Disabilities Act (hereinafter referred to as the AODA), which places a legal obligation on the University to provide accessibility for Ontarians with disabilities with respect to goods, services, facilities, accommodation, employment, buildings, structures and premises on or before January 1, 2025. The University is committed to fostering, creating and maintaining a barrier-free environment for all individuals providing equal rights and opportunities, and as a result has established the University Policy on Accessibility, which is accessible at:

<http://www.hrandequity.utoronto.ca/about-hr-equity/diversity/aoda.htm>

All members of the University community, including suppliers required to be on campus, contractors and subcontractors, engaged by the University, are responsible to adhere to and comply with the commitments set out in all University policies. Proponents and their sub-contractors are required to adhere to all University policies.

1.7 DEFINITIONS

Unless otherwise specified in this RFP, words and phrases below have the following meaning:

Active User	Refers to the number of authorized end users, at any particular time, permitted to be registered to access one or more areas (course shells, organizational websites, etc.) provided through the software solution
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Agreement	The binding and enforceable agreement between the University and the Successful Proponent to provide the Deliverables, which is the subject matter of this RFP document.
BonfireHub	BonfireHub is the University's web portal tool that allows purchasing teams accept and evaluate Proponent Proposals. Please visit http://www.bonfirehub.com/ for more information and refer to Section 4.4 Submission of Proposals for details.
Business Day	Any working day, Monday to Friday inclusive, but excluding statutory and other holidays, namely: New Year's Day; Family Day; Good Friday; Victoria Day; Canada Day; Civic Holiday; Labour Day; Thanksgiving Day; Remembrance Day; Christmas Day; Boxing Day and any other day which the University has elected to be closed for business;
Deliverables	The goods/services furnished by the Successful Proponent pursuant to the Agreement including all labour, materials, equipment, services and any other items, which the Proponent requires to fulfill its obligations under the Agreement.
Proponent	Any individual, firm, company or corporation submitting a Proposal in response to an RFP.
Proposal	The non-binding offer of a Proponent to provide the Deliverables in response to an RFP.
Rectification Date	The rectification date allows the University to review whether a Proponent met the submission mandatory requirements in the RFP document and allows the Proponent an opportunity to rectify any minor administrative error(s).
Requested Documents	The Proposal submission in the requested format indicated in Appendix F to the RFP document.
Request for Proposal	The document issued by the University which seeks competitive offers from Proponents.
Successful Proponent	Or a pronoun in place thereof is a Proponent selected by the University, who, upon execution of the Agreement and/or acceptance of a Purchase Order, will provide the Deliverables as per the terms and conditions agreed upon.

[End of Part 1]

PART 2 – THE DELIVERABLES

2.1 DESCRIPTION OF DELIVERABLES

The RFP is an invitation to submit offers for the provision of a **Learning Management Engine and related services**, as further described in Appendix E – RFP Particulars – Section A. The Deliverables.

2.2 MATERIAL DISCLOSURES

Proponents should refer to Appendix E – RFP Particulars – Section B. Material Disclosures.

[End of Part 2]

PART 3 – EVALUATION OF PROPOSALS

3.1 STAGES OF PROPOSAL EVALUATION

The University will conduct the evaluation of Proposals in the following four (4) stages:

Stages	Evaluation
Stage I	Mandatory Requirements
Stage II	Rated Criteria
Stage III	Pricing
Stage IV	Information Risk & Risk Management

3.1.1 STAGE I: MANDATORY REQUIREMENTS

Stage I will consist of a review to determine which proposals comply with all of the mandatory requirements.

Proposals failing to satisfy the mandatory requirements as of the Submission Date may be provided an opportunity to rectify any deficiencies. Proposals failing to satisfy the mandatory requirements as of the Rectification Date will be excluded from further consideration.

3.1.2 STAGE II: RATED CRITERIA

Each qualified Proposal will be scored on the basis of the rated criteria. Stage II will consist of the following two sub-stages:

- i. Stage IIA – Rated Criteria for Written Proposals
- ii. Stage IIB – Community Evaluation

3.1.3 STAGE III: PRICING

The evaluation of price will be undertaken after Stage I and Stage IIA.

3.1.4 STAGE IV: INFORMATION RISK AND RISK MANAGEMENT

All scores from Stage IIA and Stage III will be added, and the Information Risk and Risk Management (IRRM) Form for the short listed Proponents will be reviewed.

3.1.5 CUMULATIVE SCORE

At the conclusion of Stage IIB, all scores will be added, and subject to the IRRM review, the highest ranking Proponent will be selected for contract negotiations in accordance with Part 4 – Terms and Conditions of the RFP Process.

3.2 STAGE I – MANDATORY REQUIREMENTS, SUBMISSION AND RECTIFICATION

3.2.1 SUBMISSION AND RECTIFICATION DATE

A Proposal must include the following completed mandatory submission forms:

Appendix	Form
Appendix B	Submission Form
Appendix C	Rate Bid Form
Appendix D	Reference Form
Schedule A	Requirements and Specifications Form

Other than inserting the information requested on the mandatory submission forms set out in the RFP, a Proponent may not make any changes to any of the forms.

Proponents submitting Proposals that do not meet the submission mandatory requirements as of the Submission Date and Time, will be provided an opportunity prior to the Rectification Date and Time to rectify any deficiencies. Proponents failing to meet all mandatory requirements as of the Rectification Date and Time will be disqualified and excluded from further evaluation.

The rectification process will be limited to only allowing rectification of the following components of a Proponent's Proposal:

- a) Appendix B Signature of Authorized Representative
- b) Reference Form

3.2.2 SUBMISSION FORM (APPENDIX B)

Each Proposal should include the Submission Form (Appendix B) completed and signed by an authorized representative of the Proponent.

3.2.3 RATE BID FORM (APPENDIX C)

Each Proponent should include the form according to the instructions contained in the form as well as those set out below:

- (a) rates should be provided in Canadian funds, inclusive of all applicable duties and taxes except for HST, which should be itemized separately;
- (b) rates quoted by the Proponent should be all-inclusive and shall include all labour and material costs, all travel and carriage costs, all insurance costs, all costs of delivery to the University, all costs of installation and set-up, including any pre-delivery inspection charges, and all other overhead, including any fees or other charges required by law.

3.2.4 REFERENCE FORM (APPENDIX D)

Each Proponent must complete the Reference Form (Appendix D) and include it with their Proposal.

3.2.5 OTHER MANDATORY REQUIREMENTS

Each Proponent must complete the following forms and include it with their Proposal:

- (a) Requirements and Specifications Form (Schedule A)

3.2.6 RECTIFICATION DATE AND TIME

Proposals satisfying the mandatory requirements before the Rectification Date will proceed to Stage II. Proposals failing to satisfy the mandatory requirements will be excluded from further consideration.

3.3 STAGE II – EVALUATION OF RATED CRITERIA

Proponents must refer to Appendix E – RFP Particulars – Section C. Rated Criteria for a breakdown of the Rated Criteria. The University shall determine, at its sole discretion, the membership of the evaluation team, which may include external consultants, instructors, students, professional staff and/or advisors.

3.4 STAGE III – EVALUATION OF PRICING

Proponents must refer to Appendix C – Rate Bid Form and Appendix E – RFP Particulars – Section D. Pricing.

3.5 STAGE IV – EVALUATION OF INFORMATION RISK AND RISK MANAGEMENT

The scores from Stage IIA and Stage III will be added, and the Information Risk and Risk Management (IRRM) form response for the short-listed Proponents will be reviewed. Proponent should refer to Schedule B -Information Risk and Risk Management for more information.

3.6 CUMULATIVE SCORE AND SELECTION OF HIGHEST SCORING PROPONENT

At the conclusion of Stage IIB, all scores will be added together and subject to not failing Stage IV, the highest ranked Proponent will be selected for negotiations in accordance with Part 4 – Terms and Conditions of the RFP process.

In the interest of time, the University may invite the highest ranked Proponent for negotiations while still conducting a review of their IRRM responses. Any contract award will be contingent on the Proponent not failing the IRRM review.

3.7 TIE SCORE

In the event of a tie score, the Successful Proponent will be determined by way of a coin toss.

[End of Part 3]

PART 4 – TERMS AND CONDITIONS OF THE RFP PROCESS

4.1 TIMETABLE

Proponents should submit their Proposals according to the following timetable and instructions:

Issue Date of RFP	April 18, 2016
Deadline for Questions	May 09, 2016
Deadline for Issuing Addenda	May 16, 2016
Submission Date and Time	May 27, 2016 at 2:00:00 pm Local Time
Rectification Date and Time	June 03, 2016 at 2:00:00 pm Local Time

The RFP timetable is tentative only, and may be changed by the University at any time.

4.2 GENERAL INFORMATION AND INSTRUCTIONS

4.2.1 PROPONENTS TO FOLLOW INSTRUCTIONS

Proponents should structure their Proposals in accordance with the instructions in the RFP. Where information is requested in the RFP, any response made in a Proposal should reference the applicable section numbers of the RFP where that request was made.

4.2.2 PROPOSALS IN ENGLISH

All Proposals are to be in English only.

4.2.3 UNIVERSITY'S INFORMATION IN RFP ONLY AN ESTIMATE

The University and its advisers make no representation, warranty or guarantee as to the accuracy of the information contained in the RFP or issued by way of addenda. Any quantities shown or data contained in the RFP or provided by way of addenda are estimates only and are for the sole purpose of indicating to Proponents the general size of the work. It is the Proponent's responsibility to avail itself of all the necessary information to prepare a Proposal in response to the RFP.

4.2.4 PROPONENTS SHALL BEAR THEIR OWN COSTS

The Proponent shall bear all costs associated with or incurred in the preparation and presentation of its Proposal, including, if applicable, costs incurred for interviews, presentations, proof-of-concepts, test instances, and/or demonstrations.

4.2.5 COMMUNICATION OF ALL RFP DOCUMENTS AND ADDENDA

The University will only post RFP documents and any associated addenda and questions and answers on the MERX website. Refer to the following link: <https://www.merx.com>

4.3 COMMUNICATION

4.3.1 PROPONENTS TO REVIEW RFP

Proponents shall promptly examine all of the documents comprising the RFP, and

- a) shall report any errors, omissions or ambiguities; and
- b) may direct questions or seek additional information.

No such communications are to be directed to anyone other than the University Contact. The University is under no obligation to provide additional information.

It is the responsibility of the Proponent to seek clarification from the University Contact on any matter it considers to be unclear. The University shall not be responsible for any misunderstanding on the part of the Proponent concerning the RFP or its process.

4.3.2 ALL NEW INFORMATION TO PROPONENTS BY WAY OF ADDENDA

The RFP may be amended only by an addendum in accordance with this section. If the University, for any reason, determines that it is necessary to provide additional information relating to the RFP, such information will be communicated to all Proponents by addenda. Each addendum forms an integral part of the RFP. Proponents are responsible for obtaining all addenda issued by the University. In the Submission Form (Appendix B), Proponents should confirm their receipt of all addenda by setting out the number of each addendum in the space provided.

4.3.3 POST-DEADLINE ADDENDA AND EXTENSION OF SUBMISSION DATE

If any addendum is issued after the Deadline for Issuing Addenda, the University may at its discretion extend the Submission Date for a reasonable amount of time.

4.3.4 VERIFY, CLARIFY AND SUPPLEMENT

When evaluating responses, the University may request further information from the Proponent or third parties in order to verify, clarify or supplement the information provided in the Proponent's submission. The University may revisit and re-evaluate the Proponent's response or ranking on the basis of any such information.

4.4 SUBMISSION OF PROPOSALS

4.4.1 PROPOSALS MUST BE SUBMITTED ONLY IN PRESCRIBED MANNER

The University is using the [BonfireHub](#) portal for accepting and/or evaluating Proposals electronically.

Proponents should prepare their Proposal response into the following Requested Document(s):

Name	Type	# Files	Requirement
Appendix B - Submission Form	File Type: Any (.*)	1	Required
Appendix C - Rate Bid Form	File Type: Any (.*)	1	Required
Appendix D - Reference Form	File Type: Any (.*)	1	Required
Schedule A - Requirements and Specifications Form	File Type: Any (.*)	1	Required
Written Proposals	File Type: Any (.*)	Multiple	Required

Please note that only one (1) file can be uploaded for each Requested Document above (unless stated otherwise). If more than one file is uploaded into the same slot, the previous file will be overwritten.

Proposals submitted in any other manner may be subject to disqualification. The University will not accept, acknowledge, or return hard copy, facsimile and electronically emailed Proposals outside of the BonfireHub web portal.

Proponents are requested **not to embed any documents within the uploaded files**, as they will not be accessible – Proponent can use the Additional Info upload slots if Proponents have additional documents that they would like to submit.

The University accepts no responsibility or liability for misdirected or incomplete Proposals. The Proponent has sole responsibility to ensure the University receives the Proposal through the BonfireHub web portal on or before the Submission Date and Time.

4.4.2 PROPOSALS MUST BE SUBMITTED ON TIME ELECTRONICALLY

Proponents must upload all Requested Documents to:

<https://utoronto.bonfirehub.ca/opportunities/3972>

4.4.3 IMPORTANT NOTES REGARDING PROPOSAL SUBMISSION

- Each Requested Document is instantly sealed and will only be visible after the Submission Date and Time.
- Uploading large documents may take significant time, depending on the size of the file(s) and the Proponent's Internet connection speed.
- The Proponent will receive an email confirmation receipt with a unique confirmation number once they have finalized their submission.
- Each Requested Document has a maximum size of 100MB. Any Requested Document exceeding this limit will not be accepted.
- Minimum system requirements: Internet Explorer 8/9/10+, Google Chrome, or Mozilla Firefox. Javascript must be enabled and Adobe Flash Player version 9+ installed.

Need Help?

If there are any technical questions related to uploading a submission, please contact Bonfire at Support@GoBonfire.com prior to the Submission Date and Time. Proponents can also visit their help forum at <https://bonfirehub.zendesk.com/hc>.

4.4.4 WITHDRAWING PROPOSALS

At any time throughout the RFP process, a Proponent may withdraw a submitted Proposal. To effect a withdrawal, a notice of withdrawal must be sent to the University Contact and must be signed by an authorized representative.

4.4.5 AMENDING PROPOSALS

At any time up to the Submission Date, a Proponent may amend a submitted Proposal. No amendment or change to Proposals will be accepted after the Submission Date.

To amend a Proposal, Proponents must log into the Bonfire web portal, select the appropriate project, scroll to the bottom of the page and click on the un-submit link. Once un-submitted, Proponents may make changes to the Proposal and re-upload the file. Any amended Proposal must be finalized and submitted prior to the Submission Date and Time in order to be considered.

4.4.6 NO INCORPORATION BY REFERENCE

The entire content of the Proponent's submission must be submitted in a fixed form, and the content of websites or other external documents referred to in the Proponent's submission will not be considered to form part of its Proposal. This may include, but is not limited to, any online Terms of Service, End User License Agreements, User Guides and/or Privacy Policies.

4.4.7 PROPOSAL TO BE RETAINED BY THE UNIVERSITY

The University will not return/delete any Proposals or accompanying documentation.

4.5 NEGOTIATIONS, NOTIFICATION AND DEBRIEFING

4.5.1 SELECTION OF TOP-RANKED PROPONENT

The top-ranked Proponent, as established under Part 3 – Evaluation of Proposals, will receive a written invitation to enter into direct contract negotiations with the University.

4.5.2 TIMEFRAME AND PROCESS RULES FOR NEGOTIATIONS

The University intends to conclude negotiations within thirty (30) days commencing from the date the University invites the top-ranked Proponent to enter negotiations. A Proponent invited to enter into direct contract negotiations should, therefore, be prepared to provide requested information in a timely fashion and to conduct its negotiations expeditiously.

4.5.3 PROCESS RULES FOR NEGOTIATIONS

Negotiations will not constitute a legally binding offer to enter into a contract on the part of the University or the Proponent.

4.5.4 TERMS AND CONDITIONS

The terms and conditions found in the Form of Agreement (Appendix A) are to form the starting point for negotiations between the University and the top-ranked Proponent.

4.5.5 FAILURE TO ENTER INTO AGREEMENT

Proponents should note that if the parties cannot execute a contract within the allotted thirty (30) days, the University may invite the next-best-ranked Proponent to enter into negotiations. In accordance with the process rules in this Part 4 – Terms and Conditions of RFP Process and the Submission Form (Appendix B), there will be no legally binding relationship created with any Proponent prior to the execution of a written Agreement. With a view to expediting contract formalization, at the midway point of the above-noted timeframe, the University may elect to initiate concurrent negotiations with the next-best-ranked Proponent. Once the above-noted timeframe lapses, the University may discontinue further negotiations with that particular Proponent. This process shall continue until an Agreement is executed, or unless the University elects to cancel the RFP process.

4.5.6 NOTIFICATION TO OTHER PROPONENTS

Other Proponents that may become eligible for contract negotiations will be notified at the commencement of the negotiation process. Once an Agreement is executed between the University and the Successful Proponent, the award notification will be posted on the MERX website.

4.5.7 DEBRIEFING

Unsuccessful Proponents are entitled to a debriefing. Debriefings shall include a general overview of the evaluation process and a discussion regarding the unsuccessful Proponent's submission. A debriefing request must be submitted in writing to the University Contact and no later than 60 calendar days following award notification. The intent of the debriefing information session is to aid the Proponent in presenting a better Proposal in subsequent procurement opportunities. A debriefing is not for the purpose of providing an opportunity to challenge the procurement process.

4.5.8 BID PROTEST PROCEDURE

In the event that an unsuccessful Proponent wishes to review the decision of the University in respect of any material aspect of the RFP process, and subject to having attended a debriefing, the unsuccessful Proponent may submit a dispute in writing to the Director of Procurement Services within 10 business days of such a debriefing. Any dispute in writing that is not timely received will not be considered and the unsuccessful Proponent will be notified in writing.

A protest in writing shall include the following:

- the RFP name and number;
- the date of debriefing and name of procurement officer who conducted the debriefing;
- the name and address of the unsuccessful Proponent;
- the specific identification of the provision and/or procurement procedure that is alleged to have been breached;
- the specific description of each act alleged to have breached the procurement process;
- a precise statement of the relevant facts;
- an identification of the issues to be resolved;
- the unsuccessful Proponent's arguments and supporting documentation; and
- the unsuccessful Proponent's requested remedy.

The Director of Procurement Services will respond, in writing, to the unsuccessful Proponent within 10 business days of receiving the protest. The final decision on the issue will come from the Director of Procurement Services, in consultation with the Chief Financial Officer and shall be considered final and conclusive.

4.6 PROHIBITED COMMUNICATIONS AND CONFIDENTIAL INFORMATION

4.6.1 PROHIBITED PROPONENT COMMUNICATIONS

The Proponent must take note of the Conflict of Interest declaration set out in the Submission Form (Appendix B). For the purposes of this Section, “Conflict of Interest” shall have the meaning ascribed to it in the Submission Form (Appendix B).

4.6.2 PROPONENT NOT TO COMMUNICATE WITH MEDIA

A Proponent may not at any time directly or indirectly communicate with the media in relation to the RFP or any contract awarded pursuant to the RFP without first obtaining the written permission of the University Contact.

4.6.3 CONFIDENTIAL INFORMATION OF UNIVERSITY

All information provided by or obtained from the University in any form in connection with the RFP either before or after the issuance of the RFP:

- a) is the sole property of the University and must be treated as confidential;
- b) is not to be used for any purpose other than replying to the RFP and the performance of any subsequent Contract;
- c) must not be disclosed without prior written authorization from the University; and
- d) shall be returned by the Proponents to the University immediately upon the request of the University.

4.6.4 CONFIDENTIAL INFORMATION OF PROPONENT

A Proponent should identify any information in its Proposal or any accompanying documentation supplied in confidence for which confidentiality is to be maintained by the University, except as otherwise required by law or by order of a court or tribunal. Proponents are advised that their Proposals will, as necessary, be disclosed on a confidential basis, to the University’s advisers retained for the purpose of evaluating or participating in the evaluation of their Proposals. If a Proponent has any questions about the collection and use of personal information pursuant to the RFP, questions are to be submitted to the University Contact.

4.7 PROCUREMENT PROCESS NON-BINDING

4.7.1 NO CONTRACT A AND NO CLAIMS

The procurement process is not intended to, and shall not create a formal legally binding bidding process and, shall be governed by the law applicable to direct commercial negotiations. For greater certainty and without limitation: (a) the RFP shall not give rise to any “Contract A” – based tendering law duties or any other legal obligations arising out of any process contract or collateral contract; and (b) neither the

Proponent nor the University shall have the right to make any breach of contract, tort or other claims against the other with respect to the award of a contract, failure to award a contract or failure to honour a response to the RFP.

4.7.2 NO CONTRACT UNTIL EXECUTION OF WRITTEN AGREEMENT

The RFP process is intended to identify prospective vendors for the purposes of negotiating potential agreements. No legal relationship or obligation regarding the procurement of any good or service shall be created between the Proponent and the University by the RFP process until the successful negotiation and execution of a written agreement for the acquisition of such goods and/or services.

4.7.3 NON-BINDING PRICE ESTIMATES

While the pricing information provided in responses will be non-binding prior to the execution of a written agreement, such information will be assessed during the evaluation of the responses and the ranking of the Proponents. Any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact any such evaluation, ranking or contract award.

4.7.4 DISQUALIFICATION FOR MISREPRESENTATION

The University may disqualify the Proponent or rescind an Agreement subsequently entered if the Proponent's response contains misrepresentations or any other inaccurate, misleading or incomplete information.

4.7.5 REFERENCES AND PAST PERFORMANCE

The University's evaluation may include information provided by the Proponent's references and may also consider the Proponent's past performance on previous contracts with the University or other institutions.

4.7.6 INAPPROPRIATE CONDUCT

The University may prohibit a supplier from participating in a procurement process based on past performance or based on inappropriate conduct in a prior procurement process, and such inappropriate conduct shall include, but not be limited to the following: (a) the submission of quotations containing misrepresentations or any other inaccurate, misleading or incomplete information; (b) the refusal of the supplier to honour its pricing or other commitments made in its Proposal; or (c) any other conduct, situation or circumstance, as solely determined by the University, which constitutes a Conflict of Interest. For the purposes of this Section, "Conflict of Interest" shall have the meaning ascribed to it in the Submission Form (Appendix B).

4.7.7 CANCELLATION

The University may cancel or amend the RFP process without liability at any time.

4.8 GOVERNING LAW AND INTERPRETATION

4.8.1 GOVERNING LAW

The terms and conditions in this Part 4 – Terms and Conditions of RFP Process (a) are included for greater certainty and are intended to be interpreted broadly and separately (with no particular provision intended to limit the scope of any other provision); (b) are non-exhaustive (and shall not be construed as intending to limit the pre-existing rights of the parties to engage in pre-contractual discussions in accordance with the common law governing direct commercial negotiations); and (c) are to be governed by and construed in accordance with the laws of the province or territory within which the University is located and the federal laws of Canada applicable therein.

[End of Part 4]

APPENDIX A – FORM OF AGREEMENT TERM SHEET

Form of Agreement

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2.08 Contract Binding		
Article 3 – Performance by Supplier		
3.01 Commencement of Performance and Delivery		
		Article 4 - Payment for Performance
	4.01	Payment According to Contract Rates
	4.02	Default Billing and Payment Process
	4.03	Hold Back or Set Off
	4.04	No Expenses or Additional Charges
	4.05	Payment of Taxes and Duties
	4.06	Withholding Tax
	4.07	Interest on Late Payment
	4.08	Document Retention and Audit
		Article 5 – Confidentiality and FIPPA
	5.01	Confidentiality and Promotion Restrictions

- 5.02 University Confidential Information
- 5.03 Restrictions on Copying
- 5.04 Injunctive and Other Relief
- 5.05 Notice and Protective Order
- 5.06 FIPPA Records and Compliance
- 5.07 Survival

Article 6 - Intellectual Property

- 6.01 University Intellectual Property
- 6.02 No Use of University Insignia
- 6.03 Supplier's Grant of License
- 6.04 Supplier Representation and Warranty Regarding Third-Party Intellectual Property
- 6.05 Survival

Article 7 - Indemnity and Insurance

- 7.01 Supplier Indemnity

- 7.02 Supplier's Insurance
- 7.03 Proof of Insurance
- 7.04 Proof of W.S.I.A. Coverage
- 7.05 Limitation of Liability

Article 8- Termination, Expiry and Extension

- 8.01 Immediate Termination of Contract
- 8.02 Dispute Resolution by Rectification Notice
- 8.03 Termination on Notice
- 8.04 Supplier's Obligations on Termination
- 8.05 Supplier's Payment Upon Termination
- 8.06 Termination in Addition to Other Rights
- 8.07 Expiry and Extension of Contract

Schedule 1

**(Schedule of Deliverables, Rates and
Supplementary Provisions)**

Schedule 2

(Schedule of Forms)

APPENDIX B – SUBMISSION FORM

1. PROPONENT INFORMATION

Please fill out the following form, and name one person to be the contact for the RFP response and for any clarifications or amendments that might be necessary.	
Full Legal Name of Proponent:	[enter your response here]
Any Other Relevant Name under Which the Proponent Carries on Business:	[enter your response here]
Street Address:	[enter your response here]
City, Province/State:	[enter your response here]
Postal Code:	[enter your response here]
Phone Number:	[enter your response here]
Fax Number:	[enter your response here]
Company Website (If Any):	[enter your response here]
RFP Contact Person and Title:	[enter your response here]
RFP Contact Phone:	[enter your response here]
RFP Contact Facsimile:	[enter your response here]
RFP Contact E-mail:	[enter your response here]

2. ACKNOWLEDGMENT OF NON-BINDING PROCUREMENT PROCESS

The Proponent acknowledges that the RFP process will be governed by the terms and conditions of the RFP, and that, such terms and conditions confirm that this procurement process does not constitute a formal legally binding bidding process, that there will be no legal relationship or obligations created until the University, and the Successful Proponent have executed a written Agreement.

3. ABILITY TO PROVIDE DELIVERABLES

The Proponent has carefully examined the RFP documents and has a clear and comprehensive knowledge of the Deliverables required under the RFP. The Proponent represents and warrants its ability to provide the Deliverables required under the RFP in accordance with the requirements of the RFP for the Rates set out in the Rate Bid Form, and has provided a list of any subcontractors to be used to complete the proposed contract.

4. NON-BINDING PRICE ESTIMATES

The Proponent has submitted its Rates in accordance with the instructions in the RFP and in the Rate Bid Form set out in Appendix C. The Proponent confirms that the pricing information provided is accurate. The Proponent acknowledges that any inaccurate, misleading or incomplete information, including withdrawn or altered pricing, could adversely impact the acceptance of its quotation or its eligibility for future work.

5. ADDENDA

The Proponent is deemed to have read and accepted all addenda issued by the University prior to the Deadline for Issuing Addenda. The onus remains on Proponents to make any necessary amendments to their Proposal based on the addenda. The Proponent is requested to confirm that it has received all addenda by listing the addenda numbers or, if no addenda were issued, by writing the word “None” on the following line: _____ . Proponents who fail to complete this section will be deemed to have received all posted addenda.

6. CONFLICT OF INTEREST

For the purposes of this section, the term “Conflict of Interest” means

- a) in relation to the RFP process, the Proponent has an unfair advantage or engages in conduct, directly or indirectly, that may give it an unfair advantage, including but not limited to (i) having, or having access to, confidential information of the University in the preparation of its Proposal that is not available to other Proponents, (ii) communicating with any person with a view to influencing preferred treatment in the RFP process (including but not limited to the lobbying of decision makers involved in the RFP process), or (iii) engaging in conduct that compromises, or could be seen to compromise, the integrity of the RFP process; or
- b) in relation to the performance of its contractual obligations contemplated in the contract that is the subject of this procurement, the Proponent’s other commitments, relationships or financial interests (i) could, or could be seen to, exercise an improper influence over the objective, unbiased and impartial exercise of its independent judgement, or (ii) could, or could be seen to, compromise, impair or be incompatible with the effective performance of its contractual obligations.

If the box below is left blank, the Proponent will be deemed to declare that (a) there was no Conflict of Interest in preparing its Proposal; and (b) there is no foreseeable Conflict of Interest in performing the contractual obligations contemplated in the RFP.

Otherwise, if the statement below applies, check the box.

- The Proponent declares that there is an actual or potential Conflict of Interest relating to the preparation of its Proposal, and/or the Proponent foresees an actual or potential Conflict of Interest in performing the contractual obligations contemplated in the RFP.

If the Proponent declares an actual or potential Conflict of Interest by marking the box above, the Proponent must set out below details of the actual or potential Conflict of Interest:

The following individuals, as employees, advisers, or in any other capacity (a) participated in the preparation of our Proposal; **AND** (b) were employees of the University and have ceased that employment within twelve (12) months prior to the Submission Date:

Name of Individual:
Job Classification:
Department:
Last Date of Employment with the University:
Name of Last Supervisor:
Brief Description of Individual's Job Functions:
Brief Description of Nature of Individual's Participation in the Preparation of the Proposal:

(Repeat above for each identified individual)

The Proponent agrees that, upon request, the Proponent shall provide the University with additional information from each individual identified above in the form prescribed by the University.

7. DISCLOSURE OF INFORMATION

The Proponent hereby agrees that any information provided in this Proposal, even if it is identified as being supplied in confidence, may be disclosed where required by law or if required by order of a court or tribunal. The Proponent hereby consents to the disclosure, on a confidential basis, of this Proposal by the University to the University's advisers retained for the purpose of evaluating or participating in the evaluation of this Proposal.

Signature of Authorized Representative

Name and Title

Date:

I have authority to bind the Proponent.

APPENDIX C – RATE BID FORM

Proponents are requested to provide their pricing response in the table below. For components already included, please indicate “incl.” in the Net Selling Price column. Proponents must refer to Section 3.2.3. Rate Bid Form (Appendix C).

Proponents should complete the table below with all costs including, but not limited to, all software licenses, operational support, professional services, maintenance, implementation, migration, expenses, third-party licensing and sub-licensing (e.g. database licenses), etc. Add additional rows as required.

Item	Description	Year 1	Year 2	Year 3	Year 4 (extension option)	Year 5 (extension option)	Total
1	Software/ License (Includes all environments)						
2	Professional Services						
2.1	Implementation Cost						
2.2	Training cost						
2.3	Other (please explain)						
3	Maintenance/Support						
Total in Canadian dollars (exclusive of HST)							\$

Proponents should provide a simple and easy-to-calculate licensing formula for the University.

The University will not be reimbursing any expenses, including but not limited to:

- Administrative mark up
- Travel
- Transportation
- Parking
- Meals
- Accommodations

APPENDIX D – REFERENCE FORM

Proponents must provide three (3) references from clients who have obtained similar goods or services to those requested in the RFP from the Proponent in the last **five (5) years**.

References should be external to the University.

Reference #1

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

Reference #2

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

Reference #3

Company Name:	
Company Address:	
Contact Name:	
Contact Telephone Number:	
Date Work Undertaken:	
Nature of Assignment:	

APPENDIX E – RFP PARTICULARS

A. THE DELIVERABLES

A.1 INTRODUCTION AND BACKGROUND

The Governing Council of the University of Toronto (which includes the St. George campus, the University of Toronto, Mississauga campus and The University of Toronto, Scarborough Campus, collectively known as the “University”) is seeking to renew and enhance the e-learning systems and services it makes available to all of our students, instructors and staff. Specifically, we are looking for a core Learning Management Engine (LME) that will move the University along the path to a next generation digital learning environment, as described in the ground breaking, 2015 Educause report of the same name (<https://net.educause.edu/ir/library/pdf/eli3035.pdf>).

The LME is managed jointly by the University’s Centre for Teaching Support & Innovation (CTSI) and Information + Technology Services (ITS). The Office of the Provost provides policy leadership, and CTSI, along with various divisional and campus units provide end-user pedagogical and technical support.

In addition to the provisioning of technical services, the Successful Proponent should support CTSI, ITS, campus and divisional support units in the deployment of university-wide best practices and implement consistent, effective and efficient processes across divisions and departments. As part of providing and assisting with the implementation of the solution, the Proponents will be required to provide training and knowledge transfer to the aforementioned groups (CTSI, ITS, and divisional support units) so that they can use the system/solution independently.

The University recognizes that educational technologies and methodologies are important parts of pedagogical practice and can contribute to the enhancement of teaching and learning. The benefits of educational technologies are known, and Proponents should target the needs of the institution from a cost-benefit analysis. Nonetheless, as a public institution, with budget constraints, the University is committed to cost-effectiveness, especially if any services or solutions involve direct-to-student costs that may be onerous. In general, the University would prefer easy-to-manage licensing schemes, (for example, not on per-server basis), but based on a more inclusive and auditable set of user criteria (for example, the ability to track use by division or role). Proponents should be familiar not only with the needs of the marketplace, but also with comparative market pricing for educational technologies, and price their solutions accordingly, relatively, and realistically.

Proponents should also make themselves familiar with relevant institutional policies and guidelines, including but not limited to the Provostial Guidelines (<http://www.provost.utoronto.ca/Page14883.aspx>) on the Use of Digital Learning Materials, and the policies and guidelines of our Procurement Services: <http://www.procurement.utoronto.ca>.

All Proposals will need to include a Business Continuity plan and proof of scalability. Proponents are expected to demonstrate viability of their product within the institutional network, including providing local evidence of successful integration based on IMS Global standards.

A.2 OBJECTIVE

The University's overall objective for this RFP is to select the best qualified Proponent for a core LME.

We have a strong interest in evaluating cloud versus locally hosted options, and open source versus proprietary solutions.

Any new LME system should offer:

- a) Ease of use with a contemporary user interface
- b) Full support for mobile devices including iOS and Android based tablets and smartphones;
- c) Ability to do simultaneously log in from multiple devices by the same user
- d) Full support for all modern browsers including but not limited to Chrome, Safari, Explorer, and Firefox running on multiple operating systems
- e) Excellent performance and seamless scalability from small courses of a few students to massive courses as needed
- f) Effective and easy-to-use management of multiple sections within a single course shell or similar way to manage multiple course sections
- g) Learning analytics
- h) Social networking and sharing (Ability for students to collaborate)
- i) Excellent accessibility – Compliance with AODA
- j) Granular ability to turn tools on or off (not just global controls)
- k) Ability to leverage tools in our existing environment or proposed superior tools
- l) e-text book and course material plugin capacity
- m) An environment that help us build a sense of community for an engaging learning and teaching experience

Furthermore, in moving towards a next generation digital learning environment, the University is committed to full adherence to IMS Global and other related community-based industry standards vis-à-vis educational technologies.

Relevant University-based Information Technology Service teams reserve the right to evaluate the tools according to their current technical infrastructure standards. The University will be pleased to receive all relevant Proposals, including solutions that may be on premises, in a managed hosting environment, or SaaS / cloud-based solutions.

The educational value of the proposed solution should be explicitly outlined in the response to this RFP (e.g., where appropriate, demonstrated through independent, scholarly research and/or rigorous systematic design evaluation), and related to the needs of users.

A.3 FUNCTIONAL REQUIREMENTS

Proponents must complete and submit Schedule A – Requirements and Specifications Form as part of their submission.

Proponents should address all the categories in Schedule B, including but not limited to:

- a) Core Criteria
- b) Technical Specifications
- c) Known Integrations
- d) Service Level Agreements

As well, in Schedule A, Proponents should demonstrate that the solution allows the University to meet its legal obligations and requirements with regards to the Accessibility for Ontarians with Disabilities Act (AODA). Responsive design is a key criterion at the University. For more information, please visit: <http://www.aoda.utoronto.ca>.

The University is committed to the inclusion of students who may not have access to mobile devices, but is interested in leveraging the benefits of BYOD (Bring Your Own Device) where feasible, and therefore, solutions and services should ideally be Operating System-agnostic, and where applicable, they should work with all contemporary web browsers. As such, the University is also interested in leveraging mobile access (either through a responsive web interface or multiple-OS-specific apps).

The University owns all data associated with or generated by the solutions. Proposed solutions and services should allow the University to have full rights and unrestricted access to the data generated by its users without any additional costs and through any means (e.g. unrestricted APIs, batch downloads, etc.). The University is particularly interested in the growing field of Learning Analytics, including standards, (e.g., IMS CALIPER), solutions and services that would allow us to maximize the use of learning analytic tools. Furthermore, the University of Toronto Business Intelligence group performs extraction, transformation, loading and other types of data warehousing activity using assorted Informatica and Cognos tools, and proposed services and solutions should be compatible with this activity.

Proponents may also supplement this information with additional details about their solutions in their Proposals.

A.4 IMPLEMENTATION AND PROJECT MANAGEMENT

The University is looking for the Proponent to help facilitate a comprehensive, well-orchestrated and seamless implementation and deployment of their solution, including migration of course content, course structures, domains, groups, and other relevant items identified by the University. Performance and feedback should be continuously monitored and issues addressed immediately.

Proponents should provide realistic timelines for completing the project including a project plan and implementation plan for the solution. A breakdown of the implementation costs should be included in Appendix C- Rate Bid form

A.5 SERVICE LEVEL AGREEMENT

Proponents should provide a copy of their SLA as well as address all the questions regarding SLAs in Schedule A.

The resulting SLA should address the following:

A.5.1 End of Contract

Technology changes rather quickly, and the University recognizes that change may affect our ability to continue using a tool or solution, sometimes without notice. The University is committed to working with solution providers regarding both an exit strategy from a tool, and also to mitigating the negative effects of vendor-driven changes in functionality and/or business practice. In this regard, the University will be looking for evidence of how its content is curated, and for exportability of that content (not just as a theoretical construct, but actual demonstrations of exportability). As always, the University is very interested in content export solutions and methods that are standards based (e.g. IMS Common Cartridge, SCORM, etc.).

A.5.2 Changes and Enhancements

By general principle, the University prefers to incorporate change resiliency into contracts through limits on a provider's actions to make unannounced, unscheduled, undocumented, and/or, unapproved changes to its products or business practices (or at the very least, lets the University set the timing around upgrades) during the life of the contract. The University is also very interested in contractually accessing a Proponent's product enhancement process, particularly one where the University has the ability to provide direct, documented input into a solution's improvement (we would like to see proof that a Proponent takes our recommendations seriously).

A.5.3 Support Services

Support for the use of educational technologies at the University is provided by a highly diverse network of professionals who may be employed at the program, departmental, or divisional level, or in a central support unit. Proponents should have robust support systems in place to work with our professionals, and in some cases, our community members, including relevant Service Level Agreements, case tracking and resolution processes, and cost-effective professional development and training services. In the case of Open Source opportunities, solutions should be supported by an active community network or be supported by a contracting service agency.

A.5.4 Intellectual Property

It is the position of the University that matters related to intellectual property ownership are governed by internal University policies, and no supplier of services and solutions should make any ownership or transfer claims on intellectual property and content created using the service or uploaded to it. The University reserves the right to grant non-exclusive licenses to external suppliers of services. Likewise, any copyright compliance mechanisms in any proposed solutions or services must reflect and be consistent with Canadian copyright legislation.

Solely to the extent necessary to perform its obligations pursuant to its Proposal, the University would be willing to grant a royalty-free, non-exclusive, worldwide license to use, reproduce, transmit, distribute, perform, display, and, to the extent required by the solution, modify and create derivative works from the University's content. However, the University retains ownership of its content, and the Proponent shall maintain the confidentiality of all University content that is stored in the solution and/or on the servers of the Proponent, nor shall the Proponent distribute content to external / 3rd parties without prior written consent from the University.

A.5.5 University Policies Paramount

Furthermore, it is the position of the University that matters related to how content is managed and controlled are governed by internal University policies, and no supplier of services and solutions should place restrictions on, or attempt to define those matters independent of the University. For example, the determination of objectionable activities (for example, the uploading of 'obscene' material) is solely within the purview of the University, and Proponents should not propose terms of service that set limits on the University's determination in these matters.

A.5.6 No Action against authorized end users by proponent

The University acknowledges that the Proponent will not be responsible, and the University shall indemnify the Proponent to the extent allowed by applicable law, for the nature of the content or the manner in which its authorized end users use the solution, and any question or determination of libelous, defamatory, illegal, obscene content or actions, shall be within the sole purview of the University, and be governed according to the University's internal policies on such matters. No clause stating otherwise should be included in any contract, license agreement, terms of use, or similar documents.

A.6 PRIVACY AND SECURITY

Short-listed proponents will be required to participate in an Information Risk and Risk Management (IRRM) audit process which will cover standards related to the protection of personally identifiable information, protection of intellectual property, information security practices, access control practices, monitoring practices, business continuity planning, capacity and scalability of architecture, and so on. Proponents should note that their privacy policies would be made available to members of the University community.

Please refer to Schedule B – Information Risk and Risk Management for more information.

A.7 WORK LOCATION, HOURS & ESTIMATED TIMELINES

A.7.1 Work Location

The majority of the work is anticipated to take place offsite while the Proponent will be onsite for meetings, training, etc. at the University's St. George campus in downtown Toronto. Proponents are responsible for all expenses, including travel, meals, parking, etc.

A.7.2 Work Hours

The University's normal business hours are from 9:00am to 5:00pm, Monday to Friday. The Proponent should schedule all meetings during the University's normal work hours.

A.7.3 Estimated Timelines

Item	Time
Announce Shortlisted Proponents	Approximately one month after closing
First onsite Demos	Approximately one month after short-listing
Open Testing Period	Approximately seventy-five days after first demos
Second onsite Demos	At the end of the testing period
Identification of highest ranked Proponent	Approximately one month after testing period

The University may amend these estimated timelines at its sole and absolute discretion.

B. MATERIAL DISCLOSURES

B.1 PAYMENT SCHEDULE AND PAYMENT TERMS

The University's standard payment terms are net thirty-five (35) days meaning payment will be issued for each invoice thirty-five (35) days from the invoice date.

B.2 UNIVERISTY ENVIRONMENT

B.2.1 Saas / Cloud-Based vs On-Prem Solutions

SaaS /cloud-based solution proposals should include testing and data retrieval parameters. Third party software hosted at the university may be subject to different criteria than internally developed solutions.

For on-premises solutions, using equipment that will be located in one or more of the University's tri-campus data centres (DCs) and managed by a relevant University-based Information Technology Service, specific vendor and configuration requirements will need to be met. This includes all server, storage and networking equipment. Furthermore, application software must be compatible with a virtualized IT infrastructure. All on-premises solutions are subject to the approval of the IT departments that manages the relevant DC. The relevant University-based Information Technology Service teams should be involved during the development stages of new tools, in order to proactively identify and manage risk at the outset.

B.2.2 Credentialing and Authentication

The University assigns a unique, persistent identifier to all community members called the UTORid. The University implements two categories of 'level of assurance' (LoA) to assign access to online services: standard and high. Standard assurance is implemented with passwords between 8 characters and 32 characters. High assurance is implemented with a cryptographic smartcard (x.509) product and a one-time password (event-based) product. Most University online service providers – internal and 'cloud' can support both levels of assurance. At a minimum, they support the standard LoA.

Higher assurance authentication is required for users that handle private and confidential information on behalf of others (e.g. Registrars and other University administrators who handle student data).

The authentication services available to service providers are: web single sign-on via SAML 2.0 and Active Directory. The SAML 2.0 service includes support for Higher Education access federations such as the Canadian Access Federation and InCommon. OAuth2/OpenID Connect technology support is scheduled for the near term

B.2.3 Student and Human Resource Information Systems

The University has a mainframe-based custom built Student Information System. This system supports the administrative functions of the academic lifecycle. The main subsystems are: Admissions, Course and Program offerings, Registration and Enrolment, Student Fees, Awards, Grading, Convocation, and Transcripts.

Much of the student data are considered private and confidential and access is provided on a need-to-know basis. Requests for non-public Repository of Student Information (ROSI) data are subject to senior management approval and require a signed non-disclosure agreement. Course and Program data are considered public and are available from ROSI and other sources (e.g. On-line Calendar system).

A limited number of formats are supported by ROSI (CSV, Fixed Record Length). Batch jobs are usually required to export data, which are retrieved via sftp from a secure server, however, the University is increasingly committed to moving away from batch processing. Authorized VPN access is required to establish the sftp connection. Asynchronous Record-by-record access can be supported via message-oriented middleware (WebSphere MQ) and secure (HTTPS) RESTful-style Services are beginning to be supported. SOAP is an option, with WS-Security and SAML 2.0 tokens. IBM LTPAToken2 is an alternative token option if both end-points support it.

Human Resources Information System (HRIS): Very limited content is available from the HRIS system. All data are provided on a strict need-to-know basis. Requests for HR data are subject to senior management approval. Our HRIS is currently SAP ERP 6.0.

B.2.4 Classroom Technologies

Technologies or solutions that are meant to be used in the University's standardized classrooms must be compatible with the specifications and configurations maintained by each of our relevant campus-based space management groups, for example, the division of Academic & Campus Events, which is responsible for standardized classroom technologies at the University's downtown campus. This includes projection, audio, lighting and teaching station standards. Information about current specifications, configurations and standards may be found on the ACE websites (<http://www.osm.utoronto.ca> , <http://www.utm.utoronto.ca/iits/projects> , <http://www.utsc.utoronto.ca/iits/classroom-support>).

B.3 CONTRACT PROVISIONS

Any resulting Agreement should include the following provisions:

B.3.1 Governing Law

The Contract shall be governed by and construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein.

B.3.2 FIPPA

The Successful Proponent and the University acknowledge and agree that FIPPA applies to and governs all Records and may require the disclosure of such Records to third parties.

C. RATED CRITERIA

The following is an overview of the process, categories and weighting for the rated criteria of the RFP.

C.1 STAGE IIA: RATED CRITERIA FOR WRITTEN PROPOSALS

Rated Criteria Category	Weighting (Points)
C.1.1 Experience and Qualifications	5
C.1.2 Functional Requirements	35
C.1.3 Methodology and Implementation Approach	15
C.1.4 Training and Documentation	5
C.1.5 Service, Maintenance and Support	10
Subtotal Total C.1.1 – C.1.5	70
D. Pricing	30
Total Points	100

C.1.1 Experience and Qualifications – 5 Points

Each Proponent should provide the following in its Proposal:

- a) A brief description of the Proponent (no more than ½ page);
- b) A description of the goods and services the Proponent has previously and/or is currently delivering, specifically the firm's experience in providing the Deliverables, including integrating with SAP; what distinguishes the firm from its competitors; and services the firm offers that its competitors do not;
- c) The roles and responsibilities of the Proponent and any of its agents, employees and sub-contractors who will be involved in providing the Deliverables, together with the identity of those who will be performing those roles and their relevant respective expertise;
- d) Its knowledge, skills and expertise for the Deliverables in a teaching environment or multi-user facility;
- e) A Reference Form in accordance with the instructions set out in the Form attached as Appendix D to the RFP including a list of references from other users of the described Solution; references should also focus on ease of use and ongoing reliability of service(s). References should reflect experiences within the last 5 years (2011–2015).

C.1.2 Functional Requirements – 35 Points

Functional requirements will be rated based on completeness, quality, functionality, technology and proven performance of the requirements outlined in Sections A.2 and A.3 above and submitted in Schedule A. Proponents should provide details on how their proposed solution meets the requirements. Specify what functionality is included in the solution (e.g. module information, functional elements in modules that will be configured and/or made available at initial implementation, etc.). If the requirements are not met, please provide an explanation, including any suggestions on an alternative and its feature benefits for the University. Points will be allotted as follows:

- a) Core Requirements – 10 points
- b) Technical Requirements – 20 points
- c) Known Integrations – 5 points

Higher points will be awarded for an integrated solution that exceeds the University's requirements.

C.1.3 Methodology and Implementation Approach – 10 Points

The University is looking for the Proponent to help facilitate a comprehensive, well-orchestrated and seamless implementation and deployment of the solution. Proponents should describe their approach and methodology for each phase. Performance and feedback should be continuously monitored and issues addressed immediately. The types of questions to be addressed include, but may not be limited to:

- a) Describe the project management resources your organization has to support this implementation and deployment;
- b) Describe the project management methods and tools to be used in support of this implementation project, including a description of how the Proponent will report on completed Deliverables and how it intends to structure its working relationship with the University;
- c) Include a project plan for the proposed solution that includes timelines, roles, and responsibilities and time commitment requirements from both the Proponent and the University;
- d) Identify any risks and assumptions (from a staffing perspective and the deployment of the solution) the Proponent envisions and how those risks will be managed;
- e) Describe, by providing an example, how you have taken corrective action during an implementation;
- f) Describe your anticipated timelines to implement the solution, including justification for the timelines.

Higher points will be awarded to Proponents that exceed expectations.

C.1.4 Training and Documentation – 5 Points

The Proponent's should describe the types and breadth of training and documentation that will be administered and documented as per the requirements in Section A. Higher points will be awarded to Proponents that exceed expectations.

C.1.5 Service, Maintenance and Support – 10 Points

The Proponent's Proposal should describe the types of services provided, service levels, maintenance and support and any value-added services provided as part of the solution. Higher points will be awarded to Proponents that exceed expectations, as framed in Table 4 of Schedule B. As well, higher points will be awarded to Proponents that exceed expectations.

C.2 STAGE IIB: COMMUNITY EVALUATION

At the conclusion of Stage IIA, and based on the results of Stage IIA and 3, up to the top five (5) scoring Proponents may be short listed and invited for Stage IIB. Only the shortlisted Proponents will be notified and invited to participate in the Community Evaluation (i.e., demos and test drive period). Proponents not invited will be given no further consideration. The Total Scores from Stage IIA will be brought over and divided by 2. Proponents will be scored as follows:

Rated Criteria Category	Weighting (Points)
C.1.1 – C.1.5	35
C.2 Community Evaluation	35
D. Pricing	30
Total Points	100

Further information regarding the Community Evaluation may be issued to the short-listed Proponents. At the very least, but without limitation, short-listed Proponents should expect to be conducting two set of demos (on-site and/or virtual presentations) as per the estimated timelines in Section A.7.3. At a minimum, demos are to take place at each of the University’s campuses as follows:

- i. two (2) demos at St. George campus;
- ii. one (1) demo at UTM;
- iii. one (1) demo at UTSC.

More demos may be requested depending on the level of interest shown by the community. Short listed Proponents are to also set up a test instance of their solution, at no additional cost or obligation to the University at the St. George campus.

The University may, at its sole and absolute discretion, define the terms and requirements for these demonstrations and tests, including but not limited to asking short-listed Proponents to respond to a specific and/or mandatory set of use cases and/or scenarios.

During the presentations/demos/testing period, the evaluation committee may be looking for greater clarity and information on the Proponent’s solution, functionality, features, implementation, service and timelines, etc.

D. PRICING

Proponents must review and complete the Rate Bid Form in Appendix C.

Pricing: 30 points

Pricing will be scored based on a relative pricing formula using the Rates set out in the Rate Bid Form. Proponents should include all anticipated costs during the 5 year term of the contract, including but not limited to, licensing, implementation, testing, deployment, training, maintenance and support, etc.

The Lowest rate is defined as the Total Cost as indicated in Appendix C.

Each Proponent will receive a percentage of the total possible points allocated to price for the particular category it has bid on by dividing that Proponent’s price for that category into the lowest bid price in that category. For example, if a Proponent bids \$120.00 for a particular category and that

is the lowest bid price in that category, that Proponent receives 100% of the possible points for that category (120/120 = 100%). A Proponent who bids \$150.00 receives 80% of the possible points for that category (120/150 = 80%), and a Proponent who bids \$240.00 receives 50% of the possible points for that category (120/240 = 50%).

$$\frac{\textit{lowest rate}}{\textit{second lowest rate}} \times \textit{total available points} = \textit{score for Proposal with second lowest rate}$$

$$\frac{\textit{lowest rate}}{\textit{third lowest rate}} \times \textit{total available points} = \textit{score for Proposal with third lowest rate}$$

And so on, for each Proposal.

SCHEDULE A: REQUIREMENTS AND SPECIFICATIONS FORM

The following is a list of requirements and specifications for the solution. For each requirement, the Proponent shall indicate whether the proposed solution satisfies the requirement with one of the below “Provided” codes:

Y = Yes

N = No

The expectations and requirements list should be answered with a ‘Y’ or ‘N’ indicating if your company or product has the listed requirement, with the opportunity to provide further details where needed for any of the questions.

Only answer “Y” if the functionality is available in the core product offering. If the functionality is achieved with **3rd party add-ons**, please answer “N” but include the additional information with a whole language description.

Proponents should anticipate being asked to prove any or all of the assertions put forth in their response to this RFP. For example, if a Proponent affirms LTI compliance, the University may ask the Proponent to prove this assertion via demonstration.

TABLE 1: CORE REQUIREMENTS

Item	Description	Provided (Y/N)	Additional Information
1.1	Does your company and the solution protect sensitive information, such as student data or intellectual property from being put at risk? If yes, state how.		
1.2	Has your company and the solution been audited for information risk by an external agency, and are the results of that audit available to us?		

Item	Description	Provided (Y/N)	Additional Information
1.3	<p>Does the solution allow the University to take advantage of international standards and specifications for interoperability and integration? Has the product been IMS certified?</p> <p>Please specify versioning compliance in your answers below.</p>		
1.3.1	LTI compliant		
1.3.2	Common Cartridge compliant		
1.3.3	QTI compliant		
1.3.4	SCORM compliant		
1.3.5	AICC compliant		
1.3.6	CALIPER compliant		
1.3.7	xAPI compliant		
1.3.8	TIN CAN compliant		
1.3.9	Other		
1.4	<p>Does your solution include a secured Application Programming Interface (API) to allow authorized systems to interact with the data held behind the interface?</p>		
1.5	<p>Does the solution allow our users to have a seamless login experience, and the ability to move from one application to another within our toolbox?</p>		

Item	Description	Provided (Y/N)	Additional Information
1.5.1	SAML 2.0 compatibility		
1.5.2	Active Directory compatibility		
1.5.3	OAuth 2.0 compatibility		
1.5.4	OpenID compatibility		
1.5.5	LDAP compatibility		
1.5.6	Kerberos compatibility		
1.5.7	SafeNet eToken (X.509) compatibility		
1.5.8	Canadian Access Federation compatibility		
1.6	Does the solution allow for different kinds of roles / role granularity (for example, a different experience for an instructor versus a student, or between an instructor and professional staff administrator and also various levels of staff administrative access)?		
1.6.1	Does the solution allow an instructor or professional staff to have an authentic “simulated student view” for instructional design and planning purposes (including the ability to perform actions as a 'student')?		
1.6.2	Does the solution allow an individual to have more than one role (e.g., student and staff)?		
1.6.3	Does your solution include a "wait-listed student" role by default? If yes, what are the default permissions for this role?		

Item	Description	Provided (Y/N)	Additional Information
1.7	Our SIS and HRIS systems are the authoritative source for information about members of our community. Does the solution work well with our SIS and HRIS systems (can data flow properly to and from our main systems)? (see more information about these systems in the Materials Disclosure section above).		
1.7.1	ROSI/ACORN/NGSIS compatibility		
1.7.2	SAP compatibility		
1.7.3	Kuali compatibility		
1.7.4	Compatibility with common client relationship management (CRM) systems		
1.7.5	Compatibility with alternate registration systems in use at the University		
1.8	Will there be any additional cost for SIS and HRIS integration?		
1.9	Where a solution creates intellectual artefacts (and related metadata) does it allow the University (and its users) to access those artefacts, for both research and operational purposes?		
1.9.1	Does the solution allow us to store the artefacts in repositories of our choosing?		
1.9.2	Does the proposed solution comply with standards for harvesting records for discovery and the ability to capture preservation, rights, and descriptive metadata in standard and interoperable formats?		
1.9.3	Do you support metadata standards/specifications, such		

Item	Description	Provided (Y/N)	Additional Information
	as MLR, IEEE, Cancore? State those that are supported		
1.9.4	Are artefacts generated from the solution stored in openly accessible formats?		
1.10	Can the University access data and metadata generated by the use of the solution for both research and operational needs?		
1.10.1	Informatica compatibility?		
1.10.2	Cognos compatibility?		
1.10.3	Learning analytics and educational data mining applications of our choosing?		
1.10.4	Student Success applications of our choosing?		
1.11	The University seeks to limit the extent to which 3rd party vendors and service providers can use our data and metadata for other purposes, save the effective running of the service, and in all cases, would require contractual and/or written consent before access to our data is granted. Is this the practice in your company? Are there any provisions in your contract, service level agreements, or similar terms of use documents that assert rights contrary to this provision?		
1.12	It is the position of the University of Toronto that its end users should not be required to agree to Terms of Service agreements on an individual basis (a.k.a. End User License Agreement (EULAs) when accessing enterprise services and solutions (through click-throughs or any other mechanisms). Service agreements and licenses are between providers and the		

Item	Description	Provided (Y/N)	Additional Information
	University and not between the provider and individuals. Proponents should note that ToS documentation would be made available to members of the University community. In order to use the solution, are users required to click independently on a Terms of Service agreement or EULA, or is there a University-wide Terms of Service that protects the interests of our users?		
1.12.1	Does the solution's contract or Terms of Service make claims on the intellectual property of our users, or define other restrictions on use that are not compatible with University practice or policy? (see section A.5 for more detail).		
1.13	The University is particularly interested in solutions and services, which allow us to have maximum control over branding and design elements. Ideally, this could mean 'white labelling' so that it is the University's brand and name that appears to end users, not the product or company name. Does the solution allow us to control the user interface design and/or brand the experience? What level of custom branding is available (e.g. departmental branding)?		
1.14	Is the solution AODA compliant?		
1.14.1	Do you have any AODA compliance certification?		
1.15	If the solution is meant to be used in a classroom, is it compatible with various University's classroom technology standards?		

Item	Description	Provided (Y/N)	Additional Information
1.16	Does your company have a documented exit strategy for this product (i.e. how difficult would it be to stop using the solution, and/or transition to another solution)? If yes, please elaborate and include data migration format and process information.		
1.17	Are there any protections in place regarding significant changes being made to a solution while it is in use?		
1.17.1	Do you include professional development and a proper support strategy with your solution?		
1.17.2	Are there any additional costs associated with professional development and support services?		
1.17.3	If yes, are those costs broken out and identified in the attached quotation?		
1.18	Instructional decision-making and the assessment of pedagogical value related to the use of a particular solution is ultimately at the discretion of the University of Toronto's instructors/departments. It is highly recommended that solution providers be able to demonstrate that their products are grounded in education theories and evidence-based pedagogies. Can the solution provider provide documented, independent research into the pedagogical value of the solution?		

TABLE 2: TECHNICAL REQUIREMENTS

Item	Description	Provided (Y/N)	Explanation and Cross Reference
Platforms			
2.1	Does your company use multiple techniques to protect sensitive information, such as student data or intellectual property from being put at risk? If yes, please elaborate.		
2.2	Does your system support commonly utilized Web Browsers, including current versions of Microsoft Internet Explorer, Apple Safari, Mozilla Firefox, and Google Chrome?		
2.3	Does your system support the latest commonly used operating systems, including Windows, Mac OS X, and Linux?		
2.3.1	To avoid many issues with Java installations on client's computers, we ask that your system not use client side Java plugins. Can you comply with this?		
2.4	Does your system have support for multiple languages?		
2.5	Mobile Access		
2.5.1	Does your solution have the ability to access the full product interface on the native browsers of mobile devices?		
2.5.1.1	Does your solution use a responsive design methodology?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.5.2	Do you have native mobile apps for common mobile devices (please indicate the specific mobile operating systems on which you have produced apps)? Please indicate which tools are and are not accessible via your mobile apps (not the native browsers).		
2.5.3	Notwithstanding individual carrier fees, is mobile access free of any charges for students and Instructors?		
2.5.4	Do you provide mobile access free of any additional charges for the institution (i.e., are there additional license fees for mobile versions of your interface)? If yes, are those costs broken out and identified in the attached quotation?		
2.5.5	Does the solution provide the ability for users to sync some areas of a course in the app for offline viewing (Please describe)?		
2.5.6	Does the solution provide the ability for users to complete some tasks in the app when offline, and sync back to the course when online (Please describe)?		
2.5.7	Does the solution provide the ability to quickly switch between courses and organizations areas in the mobile app?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.5.8	Does the solution allow a user to login in simultaneously from multiple devices?		
2.5.9	Does your company have a specific operational contingency plan for when operating systems are upgraded (e.g. when Apple upgrades iOS)? If yes, please describe		
2.6	Offline Access		
2.6.1	Does your Core LME allow for working offline? For all users/roles (e.g. instructor, student, teaching assistants, administrators, etc.)?		
2.6.2	If so, what features are supported for working offline? If so, will synchronization occur automatically?		
Standards and Compliance			
2.7	Can your system support required volumes of class sizes of five thousand active students or more and organizations of one hundred thousand?		
2.7.1	Does the solution provide the ability to scale the implementation for increased usage, such that more storage and users can be added? Please identify any limitation from a student or course		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	perspective (daily usage, quota restrictions).		
2.8	Is your solution compatible with <i>The University's</i> technology infrastructure including network operating systems, single sign-on solution, technology stacks and other infrastructure requirements (see Materials Disclosure section above)?		
2.9	Is the solution written in an industry-standard language? What components of the system's source code can be modified? If yes, please indicate.		
Application Integration			
2.10	Does your solution support integration with other Systems or 3rd Party Applications, i.e. supports open standards, including LTI, and provides a rich API? Describe.		
2.10.1	Does your solution support interoperability with other Systems or 3rd Party Applications? Describe.		
2.10.2	Does your solution support web services, APIs, LTIs, real-time synchronization, and batch processes? Describe.		
2.10.3	Can you guarantee the stability and reliability of the APIs and LTI? Describe how changes are managed.		
2.10.4	Does your solution support managed access to the API and LTI? Please describe.		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.10.5	Do you provide an SLA for the APIs or LTI component for integration with third-party software?		
2.10.6	Does your solution support APIs to pull announcements, what's new, list of courses for users, etc. for use via other <i>The University</i> systems?		
2.10.7	Does your solution support full integration with Microsoft Office365, i.e. not just SSO integration, allowing in-line viewing, editing, and real-time collaborating to and from O365 tools?		
2.10.8	Does your solution support APIs to enable real-time integrations (i.e. simulations), for use in synchronous tools such as virtual meetings?		
2.10.9	Does your solution support the ability to integrate with specific resources from within the Core LME (example from viewing grades in <i>The University's</i> SIS to viewing grades in the Core LME)?		
2.10.10	Does your solution support APIs that support server side Java function calls (not remote procedure calls via REST or Web Services)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.10.11	Have you published your APIs? Have you provided API documentation with your proposal?		
2.10.11	If an operation cannot be performed through the API, what mechanisms are in place for <i>The University</i> to achieve the functionality?		
2.11	<p><i>Integration with Identity Management Systems</i></p> <p><i>The Core LME must be integrated with The University's Identity Management system. It is imperative that account management including the creation, modification, disabling, and deleting of accounts, roles, user groups, programs of study, course shells, and course shell registrations be managed by The University's Identity Management System. We would also like the capability to structure our courses into a hierarchy that can be grouped into course, program/department, Instructors, etc.</i></p>		
2.11.1	Do you have real-time APIs in your Core LME to provision user accounts including create, re-activate, deactivate and delete user accounts?		
2.11.2	Do you have batch processes to provision user accounts including create, re- activate, deactivate and delete user accounts?		
2.11.3	Do you have secure protocols in place for data transfer between our Identity Management		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	System and the Core LME for both real-time API and batch process?		
2.11.4	Does your system automatically purge deleted accounts including user related content? If not automatically, are there APIs available to do the purge?		
2.11.5	Do you have APIs to support username changes?		
2.11.6	What passwords are stored on your system? (user, administrator, system passwords, etc.)? How are these passwords protected (include the cryptographic hash function used)?		
2.11.7	<i>The University's</i> Identity and resource management system, provisions courses in the Core LME. <i>The University</i> would like to structure our courses into a hierarchy that can be grouped into course, program/department, faculty, etc. Do you have a real-time API for <i>The University</i> to provision the hierarchy accordingly? Example: course creation, course enrolment (Instructors, students, TAs, etc.), deactivation, deletion, reactivation, and copying of courses?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	Authentication & Access		
2.12	Is your system CAS (Central Authentication Services) enabled? (http://www.jasig.org/cas)		
2.13	In terms of your service's web interface, is the logout customizable so that <i>The University's</i> systems are notified in real-time that the user has logged out? For example via a redirect to CAS or via other methods?		
2.14	Can we customize the logout process? For example, if an end user logs out of <i>The University's</i> portal, CAS, or other system and we want to also log the end user out of the Core LME		
2.16	It is the intent of the University to use its standard SSO strategy for user access to the LME. If your solution has a 'built-in' login or logout, can it be hidden or subsumed by our SSO?		
2.17	Is there the ability to disable the local login?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.18	Do you support CAS web authentication for your mobile app?		
2.19	Do you provide the ability to configure the session timeouts?		
2.20	Do you provide the ability to dynamically authorize permissions by role to a user upon authentication?		
Accessibility Compliance			
2.21	Can your company document the conformance of your system to the World Wide Web Consortium (WC) WCAG 2.0 guidelines Success Criteria Level AA and UAAG 2.0? Please provide your company's accessibility statement.		
2.21.1	If your answer to this question is “no,” then please describe the undue burden, (i.e., the significant difficulty or expense incurred, in order to comply with the WCAG standard). If monetary expense is a basis for the undue burden, explain the costs and how they were estimated. Be sure to quantify the effort in time and money to make the proposed system/resource compliant. If technical difficulty is claimed, describe and document such difficulties.		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.21.2	If your answer to this question is “yes,” then please describe the methodology used to ascertain conformance.		
2.22	Does your solution’s UI provide text alternatives for any non-text content and components so that it can be changed into other forms people need, such as large print, braille, speech, symbols, or simpler language?		
2.23	Does your solution provide alternatives for time-based media?		
2.24	Can your solution create content that can be presented in different ways (for example simpler layout) without losing information or structure?		
2.25	Does your solution’s UI make it easier for users to see and hear content including separating foreground from background?		
2.26	Does your solution’s UI make all functionality available from a keyboard?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.27	Does your solution prevent the design of content in a way that is known to cause seizures?		
2.28	Does your solution's UI provide ways to help users navigate, find content, and determine where they are?		
2.29	Does your solution (aside from content being provided/uploaded/created by users) make text content readable and understandable?		
2.29.1	Does your solution include any tools that allow a user to check that their content is ATAG 2.0 compliant during the upload process?		
2.30	Does your solution design/interface appear and operate in predictable ways?		
2.31	Does your solution help users avoid and correct mistakes?		
2.32	Does your solution maximize compatibility with current and future user agents, including assistive technologies?		
2.33	Does your solution allow accommodations on tests or surveys to individual students (e.g., for extra time, multiple attempts, individual release, other)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.34	Please describe in detail how you ensure accessibility is built into your proposed solution from the standpoint of your product release cycle.		
2.35	Does your company have the relevant experience of applying the principles of ICT accessibility that create solutions that are accessible to the widest number of users, including users with disabilities? Describe.		
Information Security and Privacy Policies and Practices			
2.36	Do you have a current and formalized information security policy? Is it published and publicly accessible? Please provide for review.		
2.37	Do you have a current and formalized privacy, data protection, or related policy that protects client data, specifically personal information? Is it published and publicly accessible? Please provide for review.		
2.38	Do you implement recognized information security standards and practices in your application development and operations? Please list and describe		
2.39	Do you comply with international, national/provincial privacy standards? Please list ones you comply with and		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	indicate how you comply.		
2.40	Do you have procedures and controls in place to protect <i>The University's</i> and your own organizational assets, including information, software and hardware? How are they implemented and monitored/enforced?		
2.41	What are the terms of your SLA? Make sure to provide SLA details for the following: uptime, security incident resolution procedures, outages and business continuity management Please specify timeliness of client notification and handling of a security incident, measures that may be taken for incident containment, and cooperation in incident investigation and resolution.		
2.42	Would you permit <i>The University</i> to run its own vulnerability scans against you product?		
2.43	Are you subject to regular security audits or assessments (preferably conducted by a third party), such as Threat and Risk Assessments (TRAs), vulnerability assessments, code review, or service/operational audits such as SAS, SSAE, Uptime Institute Tier certification? What were the audit findings? Have the audit findings been mitigated in a timely and effective manner? How were the mitigation actions validated? Can you provide any evidence or		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	attestation of compliance or certifications attained?		
2.44	<i>The University</i> is subject to Ontario’s Freedom of Information and Protection of Privacy Act (“FIPPA”), which contains requirements about protecting clients’ personal information, providing notice about the collection, use, and disclosure of personal information Please explain how you have supported other Post Secondary clients’ ability to comply with Privacy and Data Protection Legislation (and other regulatory requirements). Examples from Ontario would be preferable.		
2.45	Does your system utilize any third party products or subcontract to third party service providers? If yes, what are the liabilities and responsibilities of the third party as they impact <i>The University</i> in the event of an incident or breach?		
2.46	How do you ensure the integrity of your software and information against malware and other harmful, unauthorized mobile code?		
2.47	Monitoring and System Logging		
2.47.1	For a hosted solution, what are your safeguards to determine whether there has been any compromise of the relevant assets? (e.g. loss or		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	modification of information, software and/or hardware)		
2.47.2	Are system events logged with sufficient information to ensure traceability to a unique individual or system?		
2.47.3	For a hosted solution what is the scope of your logging and monitoring?		
2.47.4	Does the system log all actions/creates audit trail on documents and preserve user work history even after the user is removed?		
2.47.5	Are system logs visible and searchable in an administrative GUI?		
2.47.6	Please describe how your logging infrastructure is adequately protected against unauthorized tampering.		
2.48	Network Security Management		
2.48.1	How is data in transit secured over untrusted networks such as the Internet?		
2.48.2	If hosted locally at <i>The University</i> , what are the network requirements for hosting at <i>The University</i> , e.g. firewall changes, ports opened, etc.?		
2.48.3	Describe whatever OSI layer protocols are used in your solution, particularly to secure data transfer. Include protocol names, versions and identify the uses.		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
Application Administration & Application Controls			
2.49	Administrative Meta Controls		
2.49.1	Does your solution provide the ability to configure the interface to <i>The University</i> standards (colour schemes, logos, headers/footers)?		
2.49.2	Does your solution provide the ability for administrators to post and edit system-wide, divisional or departmental announcements?		
2.49.3	Does your solution provide granular admin configurations for tools/features (i.e. so that we can turn on or off and hide features we do not use)?		
2.49.4	Does your solution provide the ability for system administrators to define allowable file types for any kind of file upload submissions (i.e. assignments)?		
2.50	General Interface		
2.50.1	Does your solution provide proper validation and error handling when uploading files (i.e. not allow files with names containing non-alphanumeric characters)? Is this consistent throughout the system, anywhere a file may be uploaded?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.50.2	Does your solution provide the ability for system administrators to display a prominent notice on the homepage of each course?		
2.50.3	Does your solution provide the ability for system administrators to enforce a pop-up notice the first time a user enters a course shell, where the User must 'agree' to continue?		
2.50.4	Does your solution provide an auto-save function so that in-progress work is not lost in the event of an unexpected system outage?		
2.51	When uploading a file, anywhere in the course and by any user, does your solution enforce a step-through process where users have to select what kind of copyright permission they have for the file? Does the system log what was selected and is it able to retrieve that information for reporting purposes?		
2.52	Does your solution provide a descriptive warning when an item is to be deleted (not just 'are you sure', but clearly indicating what is to be deleted, and if it will be permanently deleted)?		
2.53	Does your solution provide the ability for instructors to simulate and see a student view of their course?		
2.54	User Profiles and Privacy		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.54.1	According to Privacy by Design Principles, if a user profile feature is available in a system, the default setting of the profile is "Private." Is that the default for your system?		
2.54.2	Does your solution allow users to control and configure the visibility of their profiles, including what to share or not share? How granular are the access controls? Can students hide their identity from instructors?		
2.55	User Management		
2.55.1	Does your solution provide the ability to provision users to the system based on their institutional role in <i>The University's</i> identity management system?		
2.55.2	Does your solution provide the ability to assign course administrators to a selected group of courses based on institutional role and/or course category?		
2.55.3	Does your solution provide the ability to manage user profiles, where roles other than the ones in <i>The University's</i> Identity Management System need to be assigned in the solution?		
2.55.4	Does your solution provide the ability to assign storage space parameters, as well as		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	modify/update/restrict specific users storage space based on user role?		
2.55.5	Does your solution provide the ability for a system administrator to search and edit users in the system based on personal details (user name, Last/First Name, student number)?		
2.55.6	Does your solution provide ability for a system administrator to search and edit users in the system based on system roles?		
2.55.7	Does your solution provide the ability to filter content by user role?		
2.56	Role Management		
2.56.1	Does your solution provide the ability to define system roles and course roles?		
2.56.2	Does your solution provide the ability for individuals to have more than one role in the system?		
2.56.3	Does your solution provide the ability to assign privileges to course roles (i.e. instructors should have access to all system-defined course areas and tools, students should have read-only access to content and student tools and not to the grading tool, guests should have access only to areas/tools that instructor sets, etc.)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.56.4	Does your solution provide the ability to assign privileges to system roles (i.e. a system administrator should have access to all system settings, help desk role should have limited access to courses, course administrator should have access to specific course category - term, department, and a system admin role for a subset of courses, etc.)?		
2.57	Course Enrolments / Shell Membership		
2.57.1	Does your solution provide the ability to add users to courses based on information in <i>The University's</i> other information systems (for example, SIS, HRIS, CRM, etc.)?		
2.57.2	Does your solution provide the ability to add one or more sections to a course (combined sections)?		
2.57.3	Does your solution provide the ability to automatically identify the section each student belongs to within the course shell based on their enrolment information in <i>The University's</i> other information systems?		
2.57.4	Does your solution provide the ability to disable/remove users from courses based on their enrolment information in <i>The University's</i> other information systems?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.57.5	Does your solution provide the ability to update users access to courses (drop from a course and re-add to another) based on their enrolment information in <i>The University's</i> other information systems?		
2.57.6	Does your solution ensure that dropped/deactivated students do not have access to course content, tools, receive emails, etc.?		
2.57.7	Does your solution provide the ability for an administrator to manage user registrations (manually add/remove courses to users accounts)?		
2.57.8	Does your solution provide the ability for an administrator and instructors to add course users outside of the course registration (add/drop students, add/remove guests, course auditors, etc.), individually and/or in batch?		
2.57.9	Does your solution provide the ability for an administrator to enable and disable self-enrolment for a subset of courses?		
2.58	Course Shell Creation and Management		
2.58.1	Does your solution provide the ability for a system administrator to control who can create new courses in the system?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.58.2	Does your solution provide the ability for an administrator to create courses while copying content and tool settings from previous courses for a specific term?		
2.58.3	Does your solution provide the ability for an administrator to create courses based on a selected template (department/school template, etc.) for a specific term?		
2.58.4	Does your solution provide the ability for an administrator to batch-create courses (new or copies)?		
2.58.5	Does your solution provide the ability for an administrator to delete courses in batches?		
2.58.6	Does your solution provide the ability for an administrator make multiple courses visible/not visible to students?		
2.58.7	Does your solution provide the ability for an administrator to disable instructors' access to specified courses at the end of term?		
2.58.8	Does your solution provide the ability for an administrator or instructors to copy specific course content/areas/tools from a course to another?		
2.58.9	Does your solution provide the ability for an administrator or instructors to export a course		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	package that can include the course content, tools, assessments, etc. (but not the student data)?		
2.58.10	Does your solution provide the ability for an administrator or instructors to import a package exported from a course?		
2.58.11	Does your solution provide the ability to create courses that can be open to non- <i>The University</i> users?		
2.58.12	Does your solution allow for the creation of non-course (e.g. 'organizational') shells? Manually and by batch?		
2.58.13	Does your solution provide the ability to keep old courses in the system for a specified number of years (in accordance with University retention policy) and be able to allow instructors to access them for various reasons (appeals, reviews, etc.)?		
	Users, Roles, Content		
2.59	Manage Users		
2.59.1	Does your solution provide the ability for an instructor to identify students (i.e. at risk students, students who missed a deadline, etc.)?		
2.59.2	Does your solution provide the ability to handle large classes of five thousand active students and organizations of one hundred thousand members?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.59.3	List your maximum number of Active Users in a shell that can be handled without impact on system performance; specify whether or not these are measures of concurrent users or enrolled users.		
2.59.4	Does your solution provide the ability to have multiple instructors sharing and/or teaching a course?		
2.59.4.1	Does your solution allow for different types of instructor roles, for example, a lead instructor can edit/delete all other instructors' items from a course, whereas a secondary or guest instructor can only manage their own content?		
2.59.5	Does your solution provide the ability to assign specific instructors or teaching assistants to specific student sections or groups within the same course shell?		
2.59.6	Does your solution provide the ability for the system to add users with various defined roles (levels of access) to courses: instructors, co-instructors, teaching assistants, graders, instructional designers, educational developers, support staff, students, auditors, etc.?		
2.59.7	Does your solution provide the ability to export completion records for compliance training and performance, competency and career development to other University systems (for example, can		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	students/instructors download assessment results/reports, certificates of completion, etc.)?		
2.60	Groups		
2.60.1	Does your solution provide the ability for instructors to create a set of self-enrol groups, from which a student may only self-enrol in one?		
2.60.2	Can an instructor manually add group members from course membership?		
2.60.3	Can an instructor allow students to self-enrol in predefined groups, where group size may be restricted?		
2.60.4	Can an instructor set the tool to randomly add group members based on criteria (i.e. determine the number of groups, or number of members in each group)?		
2.60.5	Can an instructor create a number of groups based on the same criteria?		
2.60.6	Does your solution provide the ability for instructors to, at a glance, view group membership (count) by group?		
2.60.7	Does your solution provide the ability for instructors to, at a glance, view a list of students to see which groups they are enrolled in?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.60.8	Does your solution provide the ability for instructors to determine whether students are allowed to leave a group and join another, in the case of self-enrol groups?		
2.60.9	Does your solution include sign-up sheets (for groups, topics, presentation time, etc.) as a means of joining a self-enrol group?		
2.60.10	Does your solution provide private group access of any collaborative and communication tools (i.e. email, discussion, virtual meeting, wiki, blog), either natively embedded or as external applications?		
2.60.11	Does your solution provide the ability for group members to exchange files through the proposed system?		
2.60.12	Does your solution provide dynamic group membership based on section number?		
2.60.13	Does your solution provide dynamic group membership based on other criteria? Please elaborate in the details		
2.60.14	Does your solution provide the ability for an instructor to control the visibility of the group membership to the entire course?		
2.60.15	Does your solution provide 'smart management of users', e.g. handles students who dropped and registered late as they come, does not include dropped students?		
2.60.16	Does your solution provide the ability to email/notify the instructor when group members drop the course?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.60.18	Can subgroups of groups be created?		
2.60.19	Can course content and tools be easily assigned to groups, and customized for each group (e.g., different due dates on assignments)?		
2.60.20	Does your solution integrate with Microsoft Office 365 for the creation of group folders and documents that can be used by group members, not visible to other students in the course shell?		
2.60.21	Does your solution provide the ability, for group members, to share their work with the entire class?		
2.60.22	Does your solution provide the capability for student group activities (discussions, etc.) to be private (not viewable by the instructor - instructor initiated)?		
2.61	Manage Course Content		
2.61.1	Does your solution include an easy to use content drop box or file transfer feature?		
2.61.2	Does your solution provide users with access to manage the metadata of their content, including the use of different metadata schemas chosen at the user/course/department/school level?		
2.61.2.1	If so, which metadata schemas are supported?		
2.61.2.2	Including custom metadata schema mapping learning outcomes?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.61.3	Does your solution have any proven integrations with curriculum mapping tools, at both the content and metadata level?		
2.61.4	Does your solution provide the ability for a user to export a course (content, tests, tools) and import the resulting package into other courses?		
2.61.4.1	If yes, please provide details on the granularity of export based on role type (instructor, TA, student, administrator, etc.)		
2.61.5	Does your solution provide the ability to post/release content/assessments/tools/communication for specific student sections?		
2.61.5.1	Does your solution provide a central content repository that allows multiple course sections to point to/display the same content object within each course shell?		
2.61.6	Does your solution provide the ability to access a history of all changes in the course (communications, content, assessments) with data for each change (who, when)?		
2.61.7	Does your solution provide the ability to roll individual items back to a previous version (for example, specific piece of content)? If yes, please describe your versioning control methodology.		
2.61.8	Does your solution provide the ability to track student completion/test results for all courses in which each student is enrolled?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.61.9	Does your solution provide the ability for instructors to edit content in the system (vs. downloading a file, editing it on the computer and re-uploading it)?		
2.61.10	Does your solution allow for the creation, editing, sharing (across sections, courses and years), deletion of tests, surveys, and test banks, and is it possible to search and construct tests or surveys from items in test bank?		
2.61.10.1	Is it possible to add metadata to items in tests, surveys, test banks and is it possible to search items using the metadata tags?		
2.61.11	What authoring tools does the system support?		
2.62	Manage Course Settings		
2.62.1	Does your solution provide the ability to make a course available/not available to students? Instructors? Administrators?		
2.62.2	Does your solution provide the ability to categorize and group courses per Terms/Years/Departments?		
2.62.3	Does your solution provide the ability to change settings per group of courses, based on Term/Year/Departments (i.e. select course category 'Fall ' and make all courses unavailable to users)?		
2.63	Manage Course Tools		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.63.1	Does your solution provide the ability for an administrator to set which tools are visible in a course by default?		
2.63.2	Does your solution provide the ability for instructors to set which tools are visible/used in a course?		
2.64.3	<u>End-Of-Term</u> Does your solution provide the ability for instructors to download/export the course content, student reports, assessment submissions, grades, communications in a format that they can save and access on their computer?		
2.65	Adaptive Release / Conditional Release / Release Criteria (In the following section, the term "item" is used to refer to ANY area of the shell that allows adaptive release)		
2.65.1	Does your solution provide the ability to selectively release items to students based on multiple criteria?		
2.65.2	Does your solution provide the ability to define how long an item is available for a student to access (start and end dates and times)?		
2.65.3	Does your solution provide the ability to selectively release items to an individual or select individual(s)?		
2.65.4	Does your solution provide the ability to selectively release items based on membership in a group? E.g. by date and time, by number of attempts, other?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.65.5	Does your solution provide the ability to selectively release items based on grading tool data (e.g. score in a grade column)?		
2.65.6	Does your solution provide the ability to selectively release items only to users who have attempted a specified assessment (quiz/survey/assignment)?		
2.65.7	Does your solution provide the ability to selectively release items only to users who have reviewed a certain piece of content or area of the course shell?		
2.65.8	Does your solution provide the ability to mass update release dates/times (for example, when a shell is copied and the dates need to be updated to the new term's dates)?		
2.65.9	Does your solution provide the ability to set different release criteria to different people / groups of people?		
	Assessment		
2.66	Grading Tool		
2.66.1	Does your solution provide a centralized grading tool for each course shell?		
2.66.1.1	Does your solution provide a grading tool that can be used by a screenreader and keyboard?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.66.2	Does your solution provide the ability for the instructor to customize their view of the grading tool interface?		
2.66.2.1	Does your solution provide the ability for instructor to create grading tool columns?		
2.66.3	Can the instructor create columns of different data type, such as numeric, alphanumeric, percentage, letter grade, complete/incomplete etc.?		
2.66.3.1	With the ability to categorize columns (i.e. assignment, midterm, final grade, quiz)?		
2.66.3.2	With the ability for the instructor to create categories?		
2.66.3.3	With the ability to auto-save of each grade as it is entered into a cell (As opposed to editing the whole column and saving at the end)?		
2.66.3.4	With the ability for the instructor to move a column in three clicks or less (when already in the grading tool)?		
2.66.3.5	With the ability for the instructor to select column visibility for their own view of the grading tool?		
2.66.3.6	With the ability for the instructor to select column visibility for the students?		
2.66.3.7	With the ability for the instructor to select column visibility for selected students and groups?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.66.4	When a column is created (either manually or by another tool), is the default that students are not able to see the column (ie, the instructor has to manually to make it visible)?		
2.66.4.1	With the ability for the instructor to edit all column settings?		
2.66.4.2	With the ability for the instructor to duplicate a column and its settings within the grading tool?		
2.66.4.3	With the ability for the instructor to remove columns?		
2.66.4.4	With the ability for the instructor to rename columns?		
2.66.4.5	With the ability for the instructor to select multiple columns at once, to apply a change to all?		
2.66.4.6	With the ability for the instructor to batch remove columns (as opposed to one-at-a-time)?		
2.66.4.7	With the ability for the instructor to batch change visibility of columns?		
2.66.4.8	With the ability for the instructor to apply other changes to multiple columns at once (such as rename)?		
2.66.4.9	With the ability for the instructor to batch create columns?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.66.5	Is there an extra level of security, presented via dialog box, to prevent accidental deletion of columns that contain grades, assignment submissions, etc.?		
2.66.6	Does your solution provide the ability to enter a grade for a student in three or fewer clicks (from within the grading tool)?		
2.66.7	Does your solution provide the ability to override grades for assessments?		
2.66.8	Does your solution have the ability to display dynamic column numbers?		
2.66.9	Does your solution provide the ability to row count (simple interface to count the number of students currently visible)?		
2.66.10	Does your solution include a grading tool print function (not just the browser print, but a fully compiled spreadsheet that can be printed without downloading first)?		
2.66.11	Does your solution provide the ability to customize print (by selecting which columns to print, print filtered results, print based on group selection, etc.)?		
2.66.12	Does your solution provide the ability for instructors to track all changes to the grading tool (add/remove column, add/remove grade, change of settings, etc.), including who		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	made the change and when (from the GUI, not a log search)?		
2.66.13	Can an instructor customize the display of columns (including column width, text alignment, number of decimals to display, etc.)?		
2.66.14	Does your solution provide the ability for instructors to enter grades in the grading tool while not connected to the Internet (offline)?		
2.66.15	Does your solution provide the ability for instructors to enter grades in the grading tool while logged in to the system from a Mobile device?		
2.66.16	Does your solution provide the ability to restrict teaching assistant access to grading tool via custom criteria (i.e. filter by specific to limit TA to their own section)?		
2.66.17	Does your solution have the ability to assign delegated graders, with the ability instructor to reconcile the grades?		
2.66.18	Does your solution have the ability to grade anonymously?		
2.67	Feedback		
2.67.1	Does your solution provide the ability to add text-based feedback to a grade in three or fewer clicks (from in the grading tool)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.67.2	Does your solution provide the ability to provide a variety of feedback types (e.g., text, audio, video)? If so, how (e.g. linked, uploaded, inline, other)?		
2.67.3	Does your solution provide the ability to choose to display text feedback on the student view of grades, and/or on the downloaded spreadsheet itself (no additional clicks needed to view it)?		
2.67.4	Does your solution provide the ability for students to comment on the work of other students (peer assessments)?		
2.68	Searching, Sorting & Filtering		
2.68.1	Does your solution provide the ability to identify students who have dropped the course?		
2.68.1.1	Does your solution retain information about work completed by / grades of students who have dropped the course?		
2.68.2	Does your solution provide the ability to automatically/dynamically filter out students who have dropped the course (i.e. are "inactive" in the course) from grading tool reports?		
2.68.3	Does your solution provide the ability to filter grading tool data by custom criteria (i.e. by sections of students, by student performance on tests, by column category, groups etc.)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.68.4	Does your solution provide the ability to search the entire grade center by keyword?		
2.68.5	Does your solution provide the ability to filter search results by selecting criteria within the search interface (filter by student name, filter by column name, column type)?		
2.68.6	Can student visibility be dynamically set, using filtering by criteria, with no ability to manually hide individual students?		
2.68.7	Does your solution provide the ability to select a single column and view only it and all associated details on one page (i.e. column settings, student list, grades, number of attempts feedback, attached files)?		
2.68.8	Does your solution provide the ability to sort by any grade column?		
2.68.9	Does your solution provide the ability to select a secondary sort key (i.e. sort by last name within each section)?		
2.68.10	Does your solution provide for grading tool calculations & formulas?		
2.68.11	Does your solution provide the ability to create a column that weighs other specified columns?		
2.68.12	Does your solution provide the ability to create a column that averages other specified columns?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.68.13	Does your solution provide the ability to create a column that adds other specified columns together?		
2.68.14	Does your solution provide the ability to calculate by column category or grouping (i.e. quizzes, weekly sessions)?		
2.68.15	Does your solution provide the ability to drop a grade in the calculation, by criteria (i.e. drop lowest, drop highest, drop last)?		
2.68.16	Does your solution provide the ability to calculate students' scores (average, median, total, etc.) for individual columns? And make this visible or not visible to students?		
2.68.17	Does your solution provide the ability to include "bonus marks" to a final grade calculation?		
2.68.18	Does your solution provide the ability to use calculated columns, with calculation formula customized by instructor?		
2.69	Integration		
2.69.1	Does your solution provide the ability to integrate with third-party assessment tools, including but not limited to: plagiarism detection software, audience response systems (clickers), publisher-provided assessment tools, etc.?		
2.69.2	Does your solution provide the ability for instructor to assess and grade discussion participation and postings		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	(hooks into grading tool tool, aggregates user's posts and gives basic quantitative stats)?		
2.69.3	Does your solution provide the ability for students and/or teaching assistants to rate other students on discussion postings (connects with the grading tool for assessment purposes)?		
2.69.4	Does your solution provide the ability for instructors to transfer the final calculated grades from grading tool to <i>The University's</i> student information system?		
2.69.5	Does your solution provide the ability to transfer grades from a bubble-sheet system (such as <i>Remark Office</i> or <i>Scantron</i>) to the grading tool?		
2.69.6	Does your solution provide the ability to assign a student with an "incomplete" or other status, and submit this to the student information system?		
2.70	Advanced		
2.70.1	Does your solution provide the ability to create and edit grade schemas / ranges (i.e. to implement letter grades)?		
2.70.1.1	Does your solution provide the ability to allow instructors to customize existing grade schemas / letter grades?		
2.70.1.2	Does your solution include the ability to create letter grade definitions for specific groups or disciplines, and level of study (e.g., undergraduate and graduate)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.70.1.3	Does your solution include the ability to display more than one grade type to the student such as a primary grade and a secondary grade (e.g., a letter grade to the student, and both a letter and number or score) to the instructor?		
2.70.2	Does your solution have the ability to display various grade types to students (e.g., complete/incomplete, pass/fail percentage etc.)?		
2.70.3	Does your solution provide the ability to lock the grade schemas system wide (so instructors cannot edit)?		
2.70.4	Does your solution provide the ability to record assessment results from standard integration packages (such as SCORM and AICC)?		
2.70.5	When removing a column tied to other tool (assignment, clickers, etc.) and vice versa, is the grading tool synchronized?		
2.70.6	Does your solution provide the ability to record group assessments (e.g. single assessment for a group of students)?		
2.71	Import/Export		
2.71.1	Does your solution provide the ability for the instructor to export any/all content/columns/comments from grading tool to spreadsheet file (like .csv, .xls, .xlsx) for offline viewing?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.71.2	Does your solution provide the ability for the instructor to import data into the grading tool from a spreadsheet file (such as .csv, .xls, .xlsx), including importing into an existing column, and/or making a new column?		
2.71.3	Does your solution provide the ability to selectively choose what to import or export?		
2.71.4	Does your solution provide the ability to import a comments column (paragraph format) from a spreadsheet?		
2.71.5	Does your solution allow for import/export of tests and test banks, including relevant metadata?		
2.72	Rubrics		
2.72.1	Does your solution provide the ability for instructors, students and TAs to use rubrics to grade anything that can be assessed?		
2.72.2	Does your solution provide the ability to create rubrics?		
2.72.2.1	Including creating rubrics that map to metadata schema, including but not limited to custom learning outcomes schema (see 2.9.3.2)?		
2.72.3	Does your solution provide the ability to edit rubrics and give a warning if that rubric is in use?		
2.72.4	Does your solution provide the ability to delete rubrics and give a warning if that rubric is in use?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.72.5	Does your solution provide the ability to customize rubric columns and rows?		
2.72.6	Does your solution provide the ability to customize rubric scoring/weighting?		
2.72.7	Does your solution include the ability to create different types of rubrics (e.g., analytic or holistic)?		
2.72.8	Does your solution provide the ability to use one rubric in multiple course shells?		
2.72.9	Does your solution provide the ability to copy rubrics from semester to semester?		
2.72.10	Does your solution provide the ability to copy rubrics from one course to another?		
2.72.11	Does your solution provide the ability to export and import rubrics?		
2.72.12	Does your solution include the ability to download and print rubrics?		
2.72.13	Does your solution allow instructors to share rubrics with students? Can students download and print those shared rubrics?		
2.73	Other Grading Types		
2.73.1	When grading a graded item, (assignments, wiki, blog, and other tools, either directly integrated tools or external), does your solution provide the ability to see details such		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	the name of who submitted, student number, user name, submission date/time, and including the group name and a list of the group members where applicable?		
2.73.2	Does your solution provide the option “to grade” various tools, which will then create a column in the grading tool? For example, discussion forum, blogs, wikis (either directly integrated tools or external)?		
	Assignment Creation		
2.74	Assignment Creation		
2.74.1	Does your solution provide the ability to create and deploy assignments where students can upload a file as an assignment submission?		
2.74.2	Does your solution provide the ability to create and deploy group assignments, where one AND any group member can submit on behalf of the group, and it assigns the submission (and resulting grade) to all group members?		
2.74.3	Does your solution provide the ability for an instructor to allow any and all group members to submit for any part of an assignment, not just a single "group leader" (multi-part assignment, revisions, resubmissions, multiple attempts)?		
2.74.4	Does your solution provide the ability for the instructor to configure single, defined number, or unlimited submission attempts?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.74.5	Does your solution provide the ability automatically create column in the grading tool when an assignment is created?		
2.74.6	Does your solution provide the ability for the instructor to allocate points for an assignment?		
2.74.7	Does your solution provide the ability to create multi-part assignment?		
2.74.8	Does your solution provide the ability to allow students to submit revisions?		
2.74.9	Does your solution provide the ability for system administrators to change the file size limit on files that are submitted?		
2.75	Assignment Submission		
2.75.1	Does your solution provide the ability for students to submit multiple files for one assignment submission attempt?		
2.75.2	Does your solution provide the ability for instructors to define submission file type, where students are restricted to only submitting that file type?		
2.75.3	Does your solution provide the ability for the instructor to set an assignment due date and time, and ability to restrict submissions past this date?		
2.75.4	Does your solution allow assignment submissions from Microsoft Office 365?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.75.5	Does your solution provide the ability for instructors to see student submission dates and time for an assignment?		
2.75.6	Does your solution provide students with receipts for assignment submissions? What is the format for this receipt?		
2.75.7	Does your solution provide the ability for the instructor to grant extensions for individual users or the class for assignments?		
2.75.8	Does your solution provide the ability for instructors to share or display assessment statistics with students?		
2.76	Retrieving Assignments		
2.76.1	Does your solution provide the ability for the instructor to batch download/export the assignment submission files?		
2.76.2	Does your solution provide the ability for the instructor to download individual student's submission files?		
2.76.3	Does your solution provide the ability for the instructor to batch upload marked-up assignments and release back to students?		
2.76.4	When batch downloading assignments, is it clear to instructors who submitted and what assignment it is?		
2.77	Assignment Grading		
2.77.1	Does your solution allow instructors to grade assignments?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.77.2	Does your solution allow instructors to provide feedback on assignments?		
2.77.3	Does your solution provide the ability to do inline marking, including annotation, commenting, rubric linking, etc.?		
2.77.4	Does your solution provide the ability for instructors to download the feedback they've given students?		
	Analytics		
2.78	Is your solution compliant with IMS CALIPER standards?		
2.79	Reporting Test Results		
2.79.1	Does your solution provide the ability to access, analyze and report on learning outcomes data?		
2.79.1.1	Does your system have the ability to access learning outcomes schema and data from Kuali? Please describe how that works (API, batch, other, etc?)		
2.79.2	Do students have access to activity/analytics reports about their performance?		
2.79.3	Regarding test/quiz results, does your solution provide granular data results (various aggregation, averages, medians, per question, per test, per category, etc.)?		
2.79.4	Does your solution provide the ability to generate various reporting formats, e.g. charts, spreadsheets, graphs, etc.?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.79.5	Does your solution provide the ability to export/download student response data (raw and aggregate data)?		
2.79.6	Does your solution provide the ability to analyze and report test results, and then flag interesting/unexpected/extreme results (i.e. a large number of students answered a specific question)?		
2.79.7	Does your solution provide the ability to track and log student activities while taking the test (footprints, time on task), for example when students select an answer (i.e. time stamp of answer choice) within a test or survey?		
2.79.8	Does your solution allow for linking of content and grade center items with learning outcomes? Is it possible to export and share these created competency structures?		
2.79.9	Does your solution provide the ability to do more advanced analysis of results (e.g., point biserial correlation on test items, etc.)? Is it possible to download/export advanced analysis of results? Share advanced analysis with students?		
2.80	Grade Reporting		
2.80.1	Does your solution provide the ability to support statistical analysis of assessment results?		
2.80.2	Does your solution provide the ability to compare the statistics of multiple assessments?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.80.3	Does your solution provide the ability for the instructor to display graphs showing average class marks distributions?		
2.80.4	Does your solution provide the ability to create standard and customized reports on individual students grades, and also on overall class grades?		
2.80.5	Does your solution provide the ability to generate reports based on multiple criteria (e.g. all students that got below % on more than one assessment)?		
2.80.6	Does the solution provide both pre-testing and post-testing capabilities (including reports that compare pre- and post-test performance)?		
2.81	Aggregate Data		
2.81.1	Does your solution provide detailed student tracking for each course tool (How many discussion posts were read, how long did they spend on each quiz question, etc.)?		
2.81.2	Does your solution provide reporting on individual level activity?		
2.81.3	Does your solution provide reporting on course level activity?		
2.81.4	Does your solution provide reporting on program level activity?		
2.81.5	Does your solution provide detailed reports on student activity (log in, log out, duration, last accessed, IP)?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.81.6	Does your solution provide the ability for system administrators to enable instructors/students to see who is currently logged into courses?		
2.81.7	Are there alternative customized modules that can be built for tracking activity?		
2.81.8	The ability to export completion records for compliance training and performance, competency and career development to the HR or other related systems?		
2.81.9	Does your solution provide the ability to keep a student activity history in a course after the student has dropped the course?		
2.81.10	Does your solution provide the ability for administrators to set a specific/custom default layout for each department/school?		
2.81.11	Does your solution provide the ability to create not only course shells, but also organizations that may contain users?		
2.81.12	Does your solution include real-time warning systems for students at-risk ?		
2.81.13	Does your solution provide the ability to print data and graphs?		
Communication Tools			

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.82	Announcements		
2.82.1	Does your solution provide the ability to post announcements to an identified group (e.g. a course)?		
2.82.2	Does your solution provide the ability to post an announcement via mobile app?		
2.82.3	Does your solution provide the ability to post an announcement by sending an email?		
2.82.4	Does your solution provide the ability to edit an announcement (even after it has been posted)?		
2.82.5	Does your solution provide the ability to delete an announcement (even after it has been posted)?		
2.82.6	Does your solution provide the ability to create a draft announcement and save it for later editing?		
2.82.7	Does your solution provide the ability to schedule announcements for release?		
2.82.8	Does your solution provide the ability to trigger emails to be sent to users under pre-defined conditions?		
2.82.9	Does your solution provide the ability to lock certain announcements to remain available?		
2.82.10	Does your solution provide the ability to mark certain announcements as "Important" or "High Priority" with a		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	visual queue (both for creators and viewers of announcements?)		
2.82.11	Does your solution provide the ability for a viewer to view a list of their personally marked announcements?		
2.82.12	Does your solution provide the ability to control the order of the announcements?		
2.82.13	Does your solution allow the copying of announcements to other groups of users (e.g., a second course)?		
2.82.14	Does your solution allow announcements to be triggered from other tools? Please provide examples to indicate how and from which tools.		
2.83	Email		
2.83.1	Does your solution have an email tool (system interface for sending email)?		
2.83.2	Does your solution provide the ability for the instructor to send an email to the email accounts of any/all users in the course shell (based on shell membership)?		
2.83.3	Does the instructor always have a way to refer to the full list of recipients on sent emails?		
2.83.4	Does a user sending an email receive a copy in their email account?		
2.83.5	Does your solution provide the ability for the instructor to determine which students may use email, and to whom		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	they can send email (all users in the course, instructors, TAs, groups)? Are instructors notified when students email?		
2.83.6	By default, are students limited to only sending email to the instructor of the course?		
2.83.7	Does your solution provide the functionality to send an email from within the groups tool in the course, for easy email of a subset of students?		
2.83.8	Does your solution provide functionality to send an email from within other tools in the course, for easy email of a subset of students?		
2.83.9	Does your solution provide the ability to prepend a subject field in order to identify the email and facilitate email filtering?		
2.83.10	Does your solution provide the ability to attach documents?		
2.83.11	Does your solution provide the ability to access a history of sent messages (include subject, date/time, recipients, sender)?		
2.84	Instant Messaging		
2.84.1	Does your solution provide the ability to do instant messaging one-to-one?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.84.2	Does your solution provide the ability to do group chat (multiple participants)? List the max number of users that can participate in a chat simultaneously.		
2.84.3	Does your solution provide the ability for the user to show/hide his/her presence?		
2.84.4	Does your solution provide the ability for user to change status to Online, Away, Free to chat, On the phone, Do not disturb, etc.?		
2.84.5	Does your solution provide the ability to block users from contacting you or seeing your presence?		
2.84.6	Does your solution provide the ability to share files in the tool (list any file type restrictions or size limitations)?		
2.84.7	Does your solution provide the ability for two-way video in the tool? List if the video chat requires plug-ins.		
2.84.8	Does your solution provide the ability to record chat text history, configurable by instructor?		
2.84.9	Does your solution provide the ability to initiate encrypted chat session with another user?		
2.84.10	Does your solution provide the ability to work with Microsoft Office 365 / Skype for Business / Lync?		
2.84.11	Does your solution provide the ability to configure the system so that presence information is hidden for all users by default?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.84.12	Does your solution provide the ability to set an avatar from pre-selected options? From user uploaded file? Is it possible to set default to pre-selected options only? For which tools is this available?		
2.85	Notifications		
2.85.1	Does your solution provide the ability for system administrators to enable email notifications to users when course shells, organizations, etc. are updated?		
2.85.2	Does your solution provide the ability for system administrators to specify which areas within shells should be available for notifications (i.e. content, communications, grades)?		
2.85.3	Does your solution provide the ability for individual users to opt-in to notifications?		
2.85.4	Does your solution provide the ability for individual users to select which courses or organizations to receive notifications for?		
2.85.5	Does your solution provide the ability for individual users to select which areas within shells to receive notifications for (i.e. content, communications, grades)?		
2.85.6	Does your solution provide the ability to send institution-wide notifications to all system users, regardless of whether they have opted-in to notifications?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.85.7	Does your solution provide the ability for system administrators to set grouping of notifications (i.e. individual, digest)?		
2.85.8	Does your solution provide the ability for system administrators to set timing of notifications (i.e. digest email sent at 00:00 am)?		
2.85.9	Does your solution provide the ability to control the flow of emails, to prevent strain on the system?		
2.85.10	Please indicate which of the following areas are included in notifications:		
2.85.10.1	Content (new content added, modified)		
2.85.10.2	Assignments (new assignment posted)		
2.85.10.3	Due date reminders		
2.85.10.4	Grades (new grades posted)		
2.85.10.6	Communication Tools (new discussion posts, announcements)		
2.85.10.7	other		
2.85.11	Does the solution have an activity stream / news stream (viewable within the Core LME)?		
2.85.12	Does your solution provide the ability for users to view an aggregated list of course/organization/institution updates?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
Calendar/Scheduling			
2.86	Does your solution provide the ability to enable a course calendar?		
2.87	Does your solution provide the ability for the instructor to add events to a course calendar?		
2.88	Does your solution provide the ability for students to add their own events, notes, reminders, etc. to a personal calendar (not the course calendar)?		
2.89	Does your solution provide the ability for users to view calendars combined (i.e. all course calendars plus personal calendar)?		
2.90	Does your solution provide the ability for users to view calendars individually?		
2.91	Does your solution provide the ability to select view (such as day, week, month)?		
2.92	Does your solution provide the ability the ability to create recurring calendar entries?		
2.93	Does your solution provide the ability for instructors to edit calendars individually for multiple course sections (different due dates, etc.) within the same course shell, where students only see the due dates for their own sections?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.94	Does your solution have various ways to edit and reschedule events?		
2.95	Does your solution provide the ability to search calendar events by various criteria (keyword, etc.)?		
2.96	Does your solution provide the ability for any user to filter calendar events by type (i.e. due dates, etc.)?		
2.97	Does your solution provide the ability for the instructor to initiate a calendar event from within a course tool that is date-specific (For example: assignment due dates, scheduled chat sessions, quizzes, sign-up sheets)?		
2.98	Does your solution provide the ability for the instructor to initiate a calendar event from within a third-party course tool that is date-specific (For example: assignment due dates, scheduled chat sessions, quizzes, sign-up sheets)?		
2.99	Does your solution provide the ability to set automated reminders for calendar events (i.e. email or pop-up a week prior to due dates, etc.)?		
2.100	Is your solution integrated with Microsoft Office 365 Calendaring / MS Outlook / Exchange, i.e. export/sync to a Microsoft calendar? (List how this is possible, i.e. via API, building block, iCal subscription URL, etc.)		
2.101	Does your solution provide the ability to integrate and sync with other calendars?		
Text Box Editor (WYSIWYG)			

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.102	Does every part of the system using a text box use the SAME WYSIWYG editor?		
2.103	Does your solution have WYSIWYG editing that allows standard formatting styles (e.g., heading styles, bullet lists, bold, italics, etc.)?		
2.104	Does your WYSIWYG editor provide spell check?		
2.105	Does your WYSIWYG editor provide an equation editor?		
2.106	Does your WYSIWYG editor provide the ability to create web links?		
2.107	Does your WYSIWYG editor provide easy embedding of content from applicable third-party systems (like MyMedia, YouTube, Vimeo, etc.)?		
2.108	Does your WYSIWYG editor have the ability to attach and/or embed various media from various sources (images, videos, MyMedia, YouTube, etc.)?		
2.109	Does your WYSIWYG editor have the ability to paste from Microsoft Word and Office 365 and retain formatting?		
2.110	Does your WYSIWYG editor have the ability to paste from Microsoft Word without affecting other elements of the page/course (so that MS code doesn't break elements of the page)?		
2.111	Does your WYSIWYG editor have the ability to edit HTML source?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
2.112	Does your WYSIWYG editor support Math ML? LaTeX? Other?		
	Search		
2.113	Does your solution provide a course-wide search? Please indicate the areas included in course-wide search.		
2.114	Does the solution allow for multiline searching in which various user search criteria can be combined and excluded? If so, how is it implemented (Boolean-based or faceted search and display?)		
2.115	Does your solution allow searching of multiple courses at once?		
2.116	Does your solution allow searching of non-course-specific content storage areas?		

TABLE 3: KNOWN INTEGRATIONS

Third party integrations will be tested following the procedures published at <http://integrate.act.utoronto.ca>. The University of Toronto retains the exclusive right to change any aspect of the integration process at its sole and absolute discretion, without prior notification.

In the table below, please indicate (and provide evidence of) known integrations with third-party applications and tools. Please include any additional pricing information (including licensing) that may be incurred as a result of an integration.

Item	Description	Provided (Y/N)	Explanation and Cross Reference
3.1	Turnitin		

3.2	Learning Locker LRS		
3.3	Collaborate		
3.4	Microsoft Office 365		
3.5	WordPress		
3.6	TechSmith Relay		
3.7	Adobe Connect		
3.8	Echo360		
3.9	iClicker		
3.10	Articulate Storyline		
3.11	Adobe Captivate		
3.12	Skype		
3.13	ExamSoft		
3.14	Research Guides (e.g., LibGuides by Springshare)		
3.15	Drupal		
3.16	Social Networking applications		
3.17	Publishers' resources		
3.18	eXplorance Blue		
3.19	Badging or similar experience tracking systems		
3.20	H2T Curatr		
3.21	Other		
3.22	Does your solution include 'bundled' third party integrations (for example, integrations your company has negotiated and		

	made available through an 'app store' methodology)? If yes, can the University disable and make those apps non-visible to users? (Please note that any such third party applications are subject to the same standards listed in this document).		
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TABLE 4: SERVICE, MAINTENANCE & SUPPORT

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	Support		
4.1	Does your solution include access to a dedicated service delivery team, including a dedicated service delivery manager (SDM) and a dedicated service delivery technical engineer?		
4.2	Are there monthly utilization reports available for both the system and service?		
4.3	Is the dedicated SDM the central point-of-contact within your company?		
4.4	Does the SDM plan and project manage our implementation, growth, and planned and reactive changes?		
4.5	Does the SDM maintain day-to-day knowledge of all plans, activities, and status of projects and issues and act as a coordinator within your company for all operational and support issues for all products and/or services now or in the future?		
4.6	Does the SDM plan and manage projects involving infrastructure for scalability, optimal performance, and growth		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	in coordination with the University, and all elements within your company?		
4.7	Does the SDM coordinate engagement with the support team, engineering and operations teams, project consulting teams, and other elements of your company as needed to deliver and manage our requirements?		
4.8	Does the SDM directly manage support activities with applications and infrastructure of the system?		
4.9	Does the SDM directly oversee the ticket prioritization and escalation?		
4.10	Does the SDM manage risk assessment of support activities focused on impact analysis and evaluation based on updates and upgrades?		
4.11	Is the SDM fully dedicated to the University's administrators and operations staff through a dedicated phone number/email/instant messenger (or other contact method) for day-to-day support requests and status reporting?		
4.12	Does your company design and implement upgrade testing and/or staging in coordination with the University as necessary for testing and evaluation purposes (examples: upgrading from one version to another, upgrading application servers, etc.)?		
4.13	Does your company regularly conduct systems audit and analysis on the University's environment's performance and utilization for proactive monitoring, infrastructure		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	management, forecasting and reporting purposes?		
4.14	Does your company keep a master schedule of the University's academic activities and key events/milestones, and communicate with all company members on critical events on the calendar?		
4.14.1	The University reserves the right to check the Successful Proponent's solution for compliance with our privacy, security, interoperability and accessibility at each upgrade cycle, and upon finding deviation from those standards, can require the Proponent to take corrective action at no additional cost to the University. The corrective action should be taken in a timely manner and/or planned by mutual agreement. Is your company comfortable with this provision?		
4.15	Does your company build and execute business processes for communication and support (with a special focus on providing transparency and visibility into change management)?		
4.16	Does your company build two-way communication processes in coordination with the University for project management, support issue review and escalation, and other communication procedures as necessary?		
4.18	Does your company coordinate and facilitate regularly scheduled (weekly or monthly or quarterly) and ad-hoc project and status update meetings?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
4.19	Does your company modify and update communication processes and channels as deemed necessary by the University?		
4.20	Does your company document and report on infrastructure, projects status, and escalation issues (complete and thorough documentation will be a key aspect of meeting the management and communications expectations of the University)?		
4.21	Does your company develop detailed documents, including escalation processes, operations handbooks, infrastructure overviews, and implementation plans?		
4.22	Does your company document and provide weekly reports on all project plans and updates, and post-meeting (conference calls) minutes to the University?		
4.23	Does your company document and provide monthly updated reports to the University on items including but not limited to actual performance metrics against Service Level Agreement (SLA) requirements, monthly utilization rate of the service delivery team resources, system utilization information and other relevant materials?		
4.24	Will your service delivery team have the ability to customize the monthly reports per the University's preferences?		
4.25	Will your company provide timely and detailed change management reports of planned infrastructure changes; planned or unplanned service outages, or degradation of		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	services, and issue resolution reports?		
4.26	Will your company provide timely and detailed change management reports that documents and communicates any procedural changes that regulate the flow of code fixes, patches to the production environment?		
4.27	Specifically against contractual SLA requirements, will your company be able to provide monthly reports on system utilization and performance, including host latency graphs, user activities summaries, and systems performance analysis, with a goal to develop, mutually with the University, a standard set of reporting for overall systems performance and management?		
4.27.1	Does your solution provide a real time performance dashboard and automated reports for administrators?		
4.27.2	Does your company maintain a 'known issues' log and provide the University with full access to that resource in real time?		
	Infrastructure		
4.28	Does the solution include a production environment, that is available 24 hours a day, 7 days a week, every day of the year?		
4.29	Does the solution include service for each installation of the software or update/upgrade requiring a revised or new hardware and/or software configuration?		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
4.30	Does the solution include a production environment to provide service for up to 140,000 Active Users and 5 TB of storage and 20 Mbps of bandwidth measured using the 95 th percentile calculation delivered via redundant Internet uplink and managed firewall service?		
4.30.1	Are there any maximum concurrency limits?		
4.31	Does the solution include non-production test environments, with test copies of the solution/software designed to handle no more than 150 concurrent users at a time?		
4.32	Does the solution include non-production test environments with 50 GB of server storage and burstable bandwidth?		
4.33	Does the solution include non-production test environments with full root access to servers?		
4.34	Does the solution include two (2) Staging Environments, with test copies of the solution/software designed to handle no more than 150 concurrent users at a time, with 100 GB of storage (not including production clones) that can be use to test and approve new update/upgrade software and changes in software configuration before implementing such software in the production environment?		
4.35	Upon our request, can your company provide the University with up to twelve (12) clones of our production data per year?		
4.36	Does the solution include a Non-Production Database Server with real production data for the purposes of testing,		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	conducting research, and/or other database queries?		
4.37	Does the non production database server solution include clones of the database at the University's request?		
4.38	Does the solution include 1 TB of server storage for this database server?		
4.39	Does the solution grant access to the full database schema?		
4.40	Does the solution allow the University to query the database using any desired SQL or reporting tool?		
4.41	What are the standard access methodologies for Non-Production Database Server for the purposes of testing?		
4.42	Does the non-production database server include content files submitted into the system (e.g. Word documents and PowerPoint files)?		
4.43	Can your company provide the full range of services and infrastructure described above in a secure location in Canada, including production and test environments, backup, archives and restoration?		
4.44	Does your company charge to batch archive data on to a hard-drive and ship to the University, and if so, what is that charge?		
4.45	Please describe the most common types of batch archiving and/or cleanup requests your company will accommodate (e.g. batch copying of courses for a new semester; batch export, import, and archive of courses; batch removal of courses; batch disabling or deleting of		

Item	Description	Provided (Y/N)	Explanation and Cross Reference
	users; exporting usernames / courses from a database query, etc.)		
4.46	Does the archiving process allow the University to capture user data and content for instructor or institutional records?		
4.47	What is the method that the University can use to order services or solutions in addition to the particular services specified in this response, assuming your company offers additional services or solutions not specified in this response?		
4.48	How quickly does your company notify the University in the event of a security breach in the solution and/or data centers, or through the equipment of your company's staff?		
4.49	What penalties are incurred by your company in the event your company fails to meet any of the service levels in a negotiated contract with the University (e.g., daily cash penalties for downtime, etc.)? If you have multiple levels of service please describe them in this section.		
4.50	Please indicate cost for additional Active Users, additional bandwidth and additional storage beyond that indicated above.		
4.51	Please indicate any Data Restoration costs that may not be included in other pricing in your response.		
4.52	Please describe as a normal operating procedure, how your company caps storage and bandwidth, if at all?		

SCHEDULE B: INFORMATION RISK AND RISK MANAGEMENT/ASSESSMENT (IRRM)

Instructions:

- a) Short-listed Proponents will be required to provide the information requested for the in the Information Risk and Risk Assessment (IRRM) questionnaire. Please see <http://its.utoronto.ca/services/67> for more information.
- b) The University shall provide short-listed Proponents with a copy of the IRRM questionnaire to complete.
- c) The IRRM will be conducted after the Proponent's receipt of the IRRM questionnaire during Stage IIB of the evaluation.
- d) Proponents must provide their responses directly in the provided form and should submit the completed form within three (3) weeks from the receipt date.
- e) In the IRRM questionnaire, please complete the section(s) relevant to this project. Do not complete sections that are not relevant.
- f) In order to expedite the completion of the IRRM, please provide supporting details where appropriate rather than simple 'Yes' or 'No' answers. This is especially important if your answers indicate that a threat or risk exists.

Only the top-ranked Proponent that has their IRRM responses judged acceptable in Stage IV of the evaluations will be selected for contract negotiations. For the purpose of expediency, the University may invite the top ranked Proponent for contract negotiations before completing their IRRM review. During the IRRM review process, Proponents may be asked to supply more details. The selected Proponent's IRRM review must be judged acceptable before awarding of a contract.

SECURITY AND PRIVACY PROTECTIONS

The University of Toronto takes privacy very seriously. It is subject to, and is committed to the requirements of, the Freedom of Information and Protection of Privacy Act (FIPPA). Personal information (PI) is information about personally identifiable individuals, including name, e-mail address, e-mail message contents and other personal data.

The Successful Proponent will be accountable for the protection of confidential and sensitive information, including Personal Information, whenever such information is accessed, processed, exchanged or stored, or otherwise handled by the proponent or any of its representatives, including without limitation whenever such information is transferred among any of, the proponent, its representatives and the University.