



RESPONSE TO



REQUEST FOR INFORMATION

Student Information System (SIS)

Date: October 13th 2021

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PART II INFORMATION SOUGHT

MCCS seeks information regarding SIS applications and welcomes responses to this RFI, including creative suggestions and feedback to enhance and expedite all future processes while providing efficient, reliable, and high-quality outcomes. Respondents are not required to submit responses pertaining to every question, but the MCCS encourages interested parties to respond to any or all relevant aspects of the RFI.

MCCS seeks detailed yet succinct responses that demonstrate the Respondent's experience and/or familiarity with the subject matter. **As this is not a competitive RFP process, Respondents must not provide any specific cost or customized pricing documentation in their response.**

Questions below are to be answered on the base (unmodified) system functionality. Where the System requires a third-party product for the capability, identify the need clearly:

1) Identity

Please identify yourself and any organization you represent in this RFI.

1.a Name of Respondent

[Ari Nemser](#)

1.b Organization and affiliation

[BocaVox, LLC](#)

[Title: Business Development Representative](#)

1.c Address (organizational, if responding on behalf of an entity)

[2900 Glades Circle, Suite 500, Weston, FL 33327](#)

1.d Contact information (phone number(s) and email address)

[954-453-9705, \[anemser@bocavox.com\]\(mailto:anemser@bocavox.com\)](#)

2) General Information

Provide a brief overview of yourself and your organization.

[BocaVox was founded in 2003 by CTO Jose Sabat, PHD. In 2006, Sue Diseker Sabat, a former educator, became CEO of BocaVox. The original version of Maestro SIS was rebuilt in 2010 from the ground up as a customizable SaaS solution with the infrastructure to provide scalability with high performance for unlimited growth and ongoing updates and enhancements for all partner institutions. Maestro Student Information System by BocaVox supports the Online Consortium of The Tennessee Board of Regents, the largest higher education consortium in the USA, comprised of 40 universities, community and technical colleges across the state. See TBR institutions here: <https://www.tbr.edu/institutions/our-institutions>.](#)

We also serve a variety of private, public and nonprofit institutions, including several Alternative Education Campuses that support high school students, “Over 21” population and incarcerated students. One of our most recent implementations is a school for adult immigrants and includes a case management system embedded within Maestro, for tracking referrals to assist the students with special needs such as social workers, physicians, realtors, etc.

Our design team thinks outside the box to devise innovative solutions that will provide our partner schools and institutions with user-friendly solutions at the best value for their money, always taking care to maintain security and performance. We listen to the needs of our users and provide them with ongoing updates based on industry best practices. BocaVox continually delivers new features and enhancements to keep Maestro SIS up to date with the dynamic changes taking place in education. Many of our solutions stem from needs expressed by schools with students falling into various “at-risk” categories who must overcome diverse challenges. Devising ways to overcome these challenges and support retention and enrollment growth is a key aspect of what BocaVox provides to our clients. BocaVox is 51% woman owned and WBENC and WOSB certified.

3) Experience

Please identify your experience in providing a SaaS-based or web-hosted SIS platform with native API integrations to relevant third-party systems, including those necessary for business analytics and standard higher education data collection services.

BocaVox is a mature company with a highly evolved product, providing Maestro SIS to many institutions with thousands of affiliate schools located in over 100 counties.

The BocaVox team has both the expertise and experience to streamline the administration and support the growth of partner institutions. Integrations are one of our fortes, we successfully integrate with many of the major LMS in the market as well as payment gateways and content platforms. We have the expertise and ability to integrate with any third-party service where there is a need to pass data, especially for reporting purposes.

4) Student Lifecycle

4.a Does the application have the capacity to support students from the point of inquiry through graduation and as an active alumni/ae? **Yes.**

4.b Describe how the application provides guided and personalized new-student onboarding for disparate groups of students, including first-generation students, online-only students, veteran students, adult students, workforce students, continuing education students, gender-specificity and inclusiveness, specialty programs (i.e., Fire Science Programs), etc.

Maestro SIS is designed to support diverse student pathways, including

enrollment types (FT/PT), programs of study or degree paths, online and hybrid, and students with different statuses i.e., new, returning, adult ed, dual diploma. Maestro has a robust degree audit where students can be assigned to different programs or plans, with an option to individualize. Once a student is entered in Maestro, they are managed through status changes (active, dropped, alumni, FT, PT,) etc. etc. Applications are developed with a custom workflow dictated by the school. Any data captured in the application will translate to the student record for easy management and sorting of student populations.

- 4.c Describe each touchpoint in the process that can be Customized or Configured, such as inquiry, application, acceptance, enrollment, withdrawal, credit accumulation graduation, transfer, and alumnae/i engagement.
We can customize ANYTHING. However, Maestro has over 400 optional parameters that can be switched on or off to change major workflows as the needs of the institution change over time, minimizing the need for chargeable customizations. Maestro is highly flexible and many items can be configured throughout without a need for customization.
- 4.d Describe how the application can assess non-cognitive skills and, based on inputs, provide tips/suggestions for connecting with campus resources.
Maestro users can input qualitative comments related to a student in the gradebook, associating the assessment to a course or individual assignment. Faculty can log non-cognitive skill progress in any enrollment. All qualitative data can be transferred into a custom report, including transcripts. Maestro also has the ability to create electronic forms and surveys that can be distributed to students or filled out on behalf of students. All form data, in particular surveys/assessment forms can be aggregated into Maestro reports for analysis. Students can be identified/categorized/grouped based on various data collected and as a cohort or individual be referred to campus services via Maestro's communication tools, providing external links and any information for support. Automated emails can be created using pre-made templates that can be sent to specified groups or individuals based on triggers. This can also be accomplished more manually by an administrative user.
- 4.e Please describe how the application assists students in selecting the appropriate major of study aligned with their interests and career goals.
The application is customized and therefore the school can dictate which items of information it would like to show the student up front and also capture. Some examples include choosing programs of interest based on selected pre requisites or interests.
- 4.f Describe how the application assists students with outlining degree paths from beginning to end, including specific course selection and course registration.
Students can view and select programs and associated courses, commonly schools will choose to include links to their school website which contains greater

detailed information.

- 4.g Describe how the application assists students with identifying transfer opportunities to and from other institutions.

Any courses offered at the top level of the overarching Institutional Hierarchy can be viewed by all the affiliated institutions.

5) Non-degree Students

How does the application accommodate students who do not initially seek traditional 2-year degrees?

They can make a selection for program type they are interested in. Maestro supports diverse program types and can be setup on a per campus basis. Maestro captures partially filled applications, enabling school staff to reach out and assist student in completing their application process if needed.

- 5.a If not highlighted in the preceding section, describe how students who seek and take occasional professional development, certificate, or non-degree training are handled.

Maestro supports all types of degree and non-degree programs. We also produce custom transcripts and certificates for all types of programs.

- 5.b Can you handle the expected MCCS volume of Non-degree course is 10,000 non-credit program learners.

Absolutely.

- 5.c Describe how students who accumulate training and certifications can view and potentially apply such accomplishments to degree-granting programs.

Maestro tracks all certifications and has the ability to capture transfer credit and credential data as well. We apply applicable experience and credits to degree seeking programs.

- 5.d Describe how badge earners and other non-degree credentialing or achievements are tracked and managed.

Maestro has ID badging abilities and credentialing with an ability to create custom awards and certifications. Future enhancements to badging are on our roadmap.

- 5.e Describe how program offerings that are not associated with traditional semesters are managed in the application, including course catalog, registration, etc.

Maestro was developed to support nontraditional course scheduling (in addition to traditional semesters), such as rolling enrollments, and any course offering with odd or unique start and stop times. All course sections in Maestro are categorized by type with the ability to define those terms.

- 5.f Describe your degree/program/badge audit functionality or integration with third-party solutions in this space: [On the roadmap](#).

5.f.i Can it be associated with the catalog year of a student's entry into a degree program? [Yes](#).

5.f.ii Can it be utilized to track continuing education, workforce development,

student badges, and keep the continuity of the student if they transition from continuing education, workforce, non-matriculated to matriculated students?(Not necessarily in that order). **Yes**

6) Student Success

Does the application have the capacity to help faculty and staff identify struggling students so that they can intervene as early as possible?

YES, between internal custom reporting, robust multi-channel communications tools and detailed tracking of every interaction including academic pacing pulled from the LMS, special needs tracking, and email delivery tracking/if it was opened or when with time stamps.

6.a Describe how the application provides actionable information regarding students' academic, financial, and behavioral performance and milestones.

All reporting in Maestro is stored, providing historical copies of every report run. Student records may contain a variety of documentation including forms, uploaded documentation, discipline and behavioral logs, faculty and administrative comments as it pertains to courses, assignments or in general, and complete logs of all communications with students.

6.b Describe how the application facilitates advising and student engagement for academic success.

Maestro has a robust degree audit, what we call plan of study to support the student and advisor in understanding where the student is in program completion and what they need to take. One of Maestro's greatest strengths is our understanding of the functionalities that are crucial and foundational to student retention and success. Maestro facilitates multiple communication types: internal messaging, external (email), SMS Text Messaging, Announcement Board, with built-in automated message templates that react to specified triggers. All communications made from Maestro SIS are tracked and copied to the recipient's Maestro inbox, as well as the recipient's reply. Outgoing SMS texts and email messages are and tracked in a log, so pertinent staff members can refer back to records.

6.c Describe how this application tracks the progress of discrete groups of students and response to intervention (i.e., academic probation, unsatisfactory academic progress, non-payment, missing or failed pre-requisite course, etc.).

Maestro document server houses RTI forms as well as any other documentation related to the student academically or behaviorally. We also have a full Case Management tool available in addition to our discipline record tracking. Students can be flagged for being in a certain status such as "at risk", "on probation", "late payment status", or any key identifier the school wishes to easily track.

7) Communications and Engagement

Describe how the application allows for communications and engagement tracking with students.

One of Maestro's greatest strengths is our understanding of the functionalities that are crucial and foundational to student retention and success. Maestro facilitates multiple communication types: internal messaging, external (email), SMS Text Messaging, Announcement Board, with built-in automated message templates that react to specified triggers. All communications made from Maestro SIS are tracked and copied to the recipient's Maestro inbox, as well as the recipient's reply. Outgoing SMS texts and email messages are and tracked in a log, so pertinent staff members can refer back to records. See more detailed information:

Internal & External Email

- Maestro's communications module acts as a typical email server, including two-way embedded communications with full HTML email functionality.

Announcement Board

- Back-end users can post an announcement or event that users will see upon login – target a specific class, a group of students, or the entire school, with the option to allow replies from recipients.

Faculty Contact History

- Administrators can track teacher and advisor contact with each student. A system alert can be created to notify the teacher/advisor when contact is overdue.

Automated Message Templates

- Email forms and templates are highly configurable and activated within one or two clicks.

Automated Notifications

- Notifications can be sent to users automatically based settings in the system parameters. For example, when a student is behind pace by more than X (set in the corresponding parameter) assignments, a message can be sent to remind them to catch up.

Email Delivery Confirmation

- All outgoing emails are logged. "Email status" reveals whether an email was successfully sent, is pending, is sending now, or failed to send. Maestro also identifies to admin/staff/faculty if and when a message was opened and read by a student user and a date and time stamp indicating when it was viewed, deleted, or not viewed at all.

SMS Texting

- Maestro users can send SMS text messages. Additionally, automated messages and notifications can be sent via SMS text.

Grouping

- Students can be grouped by type, academic year, disability, state, zip, etc. and sent messages, updated, promoted, or have bulk actions performed.

Mobile Capability

- Full mobile site for student front-end users to use Maestro on the go! Multi device supported including smartphones and tablets as well as a full responsive web design.

- 7.a Include information on how the application supports calls to action such as scheduling appointments, registering for courses, completing FAFSA forms, uploading required immunization records or other documentation, paying tuition bills, etc.

Maestro provides automated notifications and emails, document requirement tracking, targeted announcements for calls to action, or as a way to communicate front and center important information to the school community. This may even include embedded videos from departments or top administration. Maestro conference scheduling tool enables faculty/advisors to set up 1 on 1 and group meetings with the students they teach or supervise. Tuition payment reminders are posted to the student portal with front and center reminders as well as a full student ledger showing all invoices, payments made and billing related records. It is here students can also make a payment for any invoiced item, including miscellaneous fees such as parking, lab kits, books etc.

- 7.b Include information on the communication modalities supported natively and through integrations, including text, email, social media, etc.

Details of communication shared in beginning of question 7. We also have a partnership and integration with Twilio.

- 7.c Describe how the application allows for the development and collection of notes regarding student interactions, such as advisor notes, tutoring notes, student activity participation, and other support service-related notes.

Every interaction can be documented as a note in Maestro. Phone calls, meetings-face to face or online, emails, and written comments tied to specific courses or assignments. Document general student record notes as well as notes from the beginning of the student journey where they inquire to the school as a lead.

- 7.d If not addressed previously, describe other of the application's contact/customer relationship management capabilities.

Nurture your prospects with personalized communication, customized email templates, and automated follow ups & notifications. Assign reps/lead agents per campus, zip code, region, or other preferences. Collect data from prospective students with dynamic inquiry forms based on your institution's criteria and standards for admission. Access reports showing results of marketing efforts.

8) Analytics and Reporting

Does the application have comprehensive data analytics and reporting capabilities?

Maestro can report on ANY data in the system in any way you like with our custom report designer. We also have the ability to filter and sort across many grids for fast access to groups of data, and the ability to export any selected data instantly to excel/csv. We also offer dashboard analytics with visual dashboards for fast insights and links that drive users to the data source in Maestro, already prefiltered/sorted per the dashboard.

- 8.a Describe your reporting tools and solutions.
We give approximately 40 standard reports out of the box and includes the custom report designer where users can build reports on any data source with any combination of query they desire, including rich editing capabilities for visual esthetic. Also, EVERY grid on Maestro can be exported to excel/csv.
- 8.b Do you have a proprietary reporting tool or use an industry standardize tool?
Proprietary
- 8.c Does your reporting tool accommodate reporting on converted legacy data?
Yes
- 8.d Describe the various aggregate and student-level reports available through this application.
As stated above, if the data is in Maestro, a report can be generated with unlimited options for custom design. Some examples of pre-made reports we offer include: financial, aging reports, GPA reports, assignment pacing, demographic reports, admission reports, lead tracking reports, completion reports, at risk student reports, and more.
- 8.e Describe how this application can provide demand for courses (specific courses and certain date/time options) from a current and future-state perspective.
Course requests are available based on term dates as well as rolling/open enrollment allowing students to self-enroll or have staff interpretation in the process. Sections can contain specific maximum number of enrollments which can be shared with the student and or staff during enrollment. Can also be displayed on public facing course catalog. Maestro's enrollment reporting completion rate tracking also supports demand driven decisions
- 8.f Describe how this application assesses risk based on student academic performance, actionable behavior, and inventory of non-cognitive survey responses.
SAP requirements are determined per client which can include disciplinary records, attendance, along with reporting functionality and HTML based form surveys that the user and/or staff can fill out/submit.
- 8.g Describe how this application provides historical trend data.
Contrary to most commercial SIS Applications, Maestro enables visibility into all records – current and historical -simultaneously. We use statuses, school years, terms, etc., allowing the user full insight without having to fully archive and later “unbox” the old data.
- 8.h Describe how this application can support the automatic filing of required Federal, State, and grant-based reports.
We can build custom reports according to any state, federal, and grant based guidelines using API, SFTP, or various methods.
- 8.i Provide a sample of common reports.
See struggling student report below.

Struggling Students by Course with Start Date Greater than 8/24/2015

Fall 2018

Algebra I_2018-19: 176 Enrollments											
0-59%		14	7.95%	60-79%		57	32.39%	80-100%		105	59.66%
Student	Grade	Course	Credit	Grade	TeacherName	School	StartDate	EndDate	Term		
Fonseca, Milena	9th	Algebra I Fall 2018	0.5	0.0	Armondo, Barbara	TEST	10.16.2018	12.28.2018	Fall 2018		
Howe, Dorothy	9th	Algebra I Fall 2018	0.5	40.0	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Kaufman, Candace	9th	Algebra I Fall 2018	0.5	43.3	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Houston, Murphy	9th	Algebra I Fall 2018	0.5	43.3	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Kent, Gillian	9th	Algebra I Fall 2018	0.5	46.7	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
House, Keele	9th	Algebra I Fall 2018	0.5	46.7	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Key, Destiny	9th	Algebra I Fall 2018	0.5	50.0	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Horton, Quyn	9th	Algebra I Fall 2018	0.5	50.0	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Garrett, Meghan	9th	Algebra I Fall 2018	0.5	53.3	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Kidd, Bevis	9th	Algebra I Fall 2018	0.5	53.3	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Horne, Casey	9th	Algebra I Fall 2018	0.5	53.3	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Lara, Quemby	9th	Algebra I Fall 2018	0.5	56.7	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Henson, Burke	9th	Algebra I Fall 2018	0.5	56.7	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
George, Rahim	9th	Algebra I Fall 2018	0.5	56.7	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Lucas, Kathleen	9th	Algebra I Fall 2018	0.5	60.0	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Gonzalez, Jael	9th	Algebra I Fall 2018	0.5	60.0	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		
Harding, Anelica	9th	Algebra I Fall 2018	0.5	60.0	Armondo, Barbara	Prepartory Academy	08.20.2018	12.31.2018	Fall 2018		

9) **Functional Components or Modules**

Briefly describe the functional organization or modules that comprise the SIS. If third-party products are required, please highlight them.

[All functionalities defined under the Modules below are included in the full Maestro SIS Enterprise System, unless otherwise indicated.](#)

STUDENT/PARENT PORTAL

- Client Branded Login Page
- View Course Catalog
- Customized Application Workflow Wizard (up to 6 steps)
- Individualized Calendars per Student
- Help Videos & User Manual Access
- Inbox/Email Communications
- Request Courses with Pre & Co Requisites
- Faculty Contact Information
- View Grades – with individual course comparison chart of student vs. class average
- View Attendance
- Class Schedule
- Analytic View of Academic Pacing (assignment progress)
- External links to other important websites
- Plan of Study/Degree Audit
- Academic Pacing

STAFF/ADMINISTRATIVE PORTAL

- **Home**
 - Announcements
 - Messaging Center
 - Applications/Admissions
 - Application/Registration Workflow with Automated Messaging
 - Documents Requirements
 - CRM/Prospect Management
- **Student**
 - View Dashboard and Update Contact Information
 - Assignment and Events Calendar
 - Announcements – 1 to 1, teacher to class, system-wide
 - Grades and Academic Performance
 - Automated Official and Unofficial Creation of Transcript (up to 20 fields)
 - Attendance
 - Tracking of Graduation Requirements per Organization/student/grade level/major/program
 - Plan of Study/Degree Audit
 - Academic Pacing
- **Faculty**
 - Database of Faculty Demographics
 - Academic Pacing per student per class with email templates
 - Communications with Students, Administration, Faculty
 - FERPA compliant access to Student Data
 - Gradebook
 - Attendance (classroom & online)
- **Courses**
 - Course Set Up and Management
 - Course Catalog
 - Pre & Co-requisites
- **Sections**
 - Section Set Up and Management
 - Gradebook
 - Attendance
- **Enrollments**
 - Fixed Term and Rolling Enrollment Management
 - Bulk Actions (enrollments, drops, completions, messaging, transfers, etc.)
 - Enrollment Transfer
 - Academic Pacing with email templates
- **Communications**
 - Email and Two-way internal messaging
 - Announcements – 1 to 1, teacher to class, organization and role, system-wide
 - Automated Notifications
 - Bulk Messaging with user-defined templates

- Announcements
- Outgoing SMS Text Messaging with automated notifications (optional via Twilio)
- **Reports**
 - Multiple filtering capability on data list pages
 - Standard “grid style” SQL query reports (exportable to Excel/CSV)
 - Custom/Ad Hoc Reporting – analytical charts & graphs, list, etc. (print or export to any Windows associated format) Training on reports is an additional cost.
 - Scheduled Reports
- **Organization Management**
 - Organizational Hierarchy Set up & Branding for one organization, additional fees per organization
 - Progress Reports/Grade Reports/Transcript Manager
- **Documents**
 - Secure Document Server
 - Automated Grades to Grade Reports & Transcripts
- **Administration**
 - Manage User Accounts - up to 17 default Roles (role-based access to certain modules/pages)
 - Activity Log, Set up of system-wide parameters and overrides
 - Field level audit of changes/updates with user name, time, and changes made
 - Bulk Import and Updates
 - Document Server
 - Transcript Generation/Grade Reports
 - External Links (website redirects)
 - Fixed Term and Rolling Enrollment Capability
 - Maestro SIS Help Videos
 - Semester Set-up and management
 - User Defined Message Templates

The Licensed Features below are available as Add-on’s for an additional cost and can be part of the initial implementation or phased in at a later date.

- LMS two-way Integration with Single Sign On
- Maestro SIS Ledger
- Single Sign-On to Payment Gateway
- Integration with Campus Ivy Financial Aid
- Dashboard Analytics
- Proctored Test Site Management
- Offline Attendance
- Coupon Codes
- Asset/Inventory Management
- Case Management

9.a Admission, recruitment, and readmission.

Maestro has a CRM functionality used to track leads for prospective students and an ability to track where the source of leads came from, using this data to help drive recruitment and marketing activities. Leads convert into applicants via a status change and account creation. Statuses are a foundational component to managing students in Maestro. When a student graduates, withdraws, takes a leave of absence, transfers (any status the institution desires) the status on their record changes and they are automatically filed in the system accordingly for easy access any time. Maestro can also make bulk changes, including status changes for a large group of students i.e., accepted or rejected.

9.b Registrar functions, including student record management.

Processing status changes, enrolling single or multiple students into a course or program is very easy with Maestro. Much of this can be automated depending on the requested process and workflows of the institution. Registrars can approve or deny course or program requests, enroll and drop students, change student program affiliations, student type, and any information on the student record. The Maestro document server holds all documents related to students in addition to a forms management on each student record and full communications log.

9.c Business office, including but not limited to billing, receivables management, accounts payable, and cashiering.

Full ledger for all billing, invoices/purchase orders, automated invoicing, organizational financial tracking, set up by location in the hierarchy i.e., per campus, department. Integrated with payment gateway.

9.d Financial Aid.

We partner with Campus Ivy via integration and support the process of posting batch awards to student ledgers, and refunds, along with a few other pieces. Other integrations are also possible. We are not a full FA servicer. All financial data in Maestro can be reported on as well within Maestro.

9.e Course scheduling, course catalog & numbering processes.

Maestro scheduling is extremely flexible and with our classroom scheduling tool identifies when there is a scheduling conflict so students cannot enroll in courses that may overlap in date and time. We offer a course catalog on the main log in page and a catalog for students to access in the student portal, enabling them to request courses and also see suggested courses based on their current program of study.

9.f Classroom assignments.

We have a campus and classroom scheduling tool available, supporting online/blended via LMS integration and offline via Maestro direct.

9.g Curriculum management and degree audits.

Maestro is designed to support diverse student pathways, including enrollment types, programs of study or degree paths, online and hybrid, and students with different statuses i.e., new, returning, adult ed, dual diploma. Maestro has a robust degree audit

where students can be assigned to different programs or plans, with an option to individualize.

9.h Housing management.

None

9.i Advising / Program planning.

Maestro's Plan of Study / Degree Audit.

9.j Grant management, fundraising, foundation management, and other philanthropy.

In development.

9.k Faculty management.

Yes. Including credential tracking and associating credentials with courses they are permitted to or qualified to teach. Also, tracking faculty communications with students with reports on days since last contact with each of their active students and visual cue indicators that change based on triggers of days since last contact to ensure no students is forgotten.

9.l Student employment and work-study.

YES. Includes current and previous employments tracking as well as salary, benefits, and other related items to support work history and transitions.

9.m General ledger, accounting, and budgeting.

Full ledger for all billing, invoices/purchase orders, automated invoicing, organizational financial tracking, set up by location in the hierarchy i.e., per campus, department. Integrated with payment gateway.

10) Configuration and Customization

10.a Describe how the application supports adaptation to MCCC and College needs through Customization and Configuration.

Maestro was designed to propel student success, faculty/administrative success and system success for organizations by providing a combination of integrated tools and our expertise- working with the institution on how to best use the tools to increase application to enroll yield, increase in fall-to-fall retention, increase in degree completion, reduction in a manual process, integration to best-of-breed third-party platforms, seamless integration of Workforce Development and non-degree programs, and reduction in time to degree completion. Through strategic use of automations, communications tracking, seamless flows from stage to stage in the student lifecycle, and use of Maestro reporting, our clients have found success in reaching similar goals as MCCC. Through our implementation process we work with your system admins and implementation team to configure the system to work how MCCC wants it to work for them. Maestro was built to mold to institutions needs and easily change over time as needs change and growth or restructuring occurs. We have a very clear plan to ensure we meet client specifications, from the hierarchy setup to roles and permissions, workflows, automations, layouts, and reporting needs. Our development team can handle just

about any customization request. Many standout functionalities in our software were born from the needs of our existing clients.

- 10.b How does the application simultaneously support system-wide and individual Collegeneeds, including branding, public portal, term variations like start times, and multiple terms open simultaneously that segment or cross over traditional (e.g., Fall/Spring) term segments.

Every instance of Maestro is branded to the school organization, with unique branding in the case of a hierarchy containing different levels, such as multiple campuses. Maestro was built to support a variety of term types, that is what we specialize in. Odd start and stop times, crossovers, extending dates, Maestro manages these situations very well.

- 10.c Describe how the application would enable disparate college-by-college curriculum and non-degree programs offerings.

Maestro is designed for multi-level organizations (i.e., multiple campuses), setting up each use in a hierarchical model based on access/permissions. Programs and degree offerings of any type can be associated to any level or branch of the organization in Maestro.

- 10.d How are work-flow creations accomplished, including how a college-specific, non-standard practice is accommodated.

Most workflows are based on a flow of statuses, these statuses are determined by the college and we organize them in the desired sequence and with the requirements to move from status to status. In many cases automations based on triggers can be set up. Due to the hierarchical model and set up, different campuses under the main college umbrella may have different setups/configurations and overall workflows than a neighboring campus.

11) Third-Party Integrations

Describe the application's integration approach and capabilities, including but are not limited to:

- 11.a Integration with (delineate out-of-the-box or custom):

- Brightspace LMS
Out-of-the-box. We have been integrating with Brightspace LMS for over 10 years
- PowerFAIDS
Custom. We have partnered with Campus Ivy for Financial Aid and our clients have found that it eliminates quite a few steps and extra work for the college in the FA process.
- FAFSA
We can provide links to FAFSA and related sites. Our partner Campus Ivy supports the FAFSA process directly.

- SAT
We can investigate. We can integrate with any system with an API in place.
- College Common Application
Custom. We can integrate with any system with an API in place.
- IPEDS
Managed by our partner Campus Ivy.

11.b Provide a complete list of pre-built, third-party vendors integrations.

- **Hosting**
 - Rackspace
 - Microsoft: Private cloud hosting environment where Maestro SIS database resides.
- **LMS (Learning Management System) Integrations with two-way data transfer and single-sign-on.**
 - Canvas
 - Buzz
 - Brightspace-D2L
 - Schoology
 - Moodle
 - Edgenuity
 - Edmentum
 - Diamond Mind
 - Moodle
 - CyberSource
 - Odysseyware
 - ESchoolware
 - Reading Plus
 - Apex Learning
 - Blackboard
 - Blackboard Collaborate
 - Connexus
 - Smart Horizons
- **Third Party Payment Gateway Integrations for Accounting/Ledger Feature to allow online payments.**
 - Authorize.Net
 - Stripe
 - PayPal
- **Financial Aid Management and Compliance**
 - Campus Ivy
- **Email service provider**
 - Send Grid
 - Option for Microsoft Graph
- **SMS service provider to allow SMS text message**
 - Twilio

- [Electronic Signature technology](#)

- [DocuSign](#)

11.c Describe API architecture for other integrations.

[Maestro offers REST-API and SOAP where necessary. We also provide single sign-on \(SSO\) using SAML, O-Auth2.0, other various methods.](#)

11.d Describe your native document management and scanning processes and integration products.

[Maestro's document server extends to all users, including the flexibility of controlling your own document folder structure. Documents can be uploaded into the server with easy drag & drop.](#)

12) Training

12.a How do you provide initial training, go-live training, and support to sustain the existing user knowledge base and new staff on-boarding needs?

[Multiple trainings with school implementation team throughout various phases of implementation. Full library of help videos covering all areas of Maestro. Monthly live webinar trainings. Additional training available upon request.](#)

12.b Provide representative, sample course materials (e.g., printed, online).

[We are not a content provider.](#)

13) Service Level Agreement (SLA)

Describe your SLA structure and levels, including:

[See Attachment 1: BocaVox SLA & Attachment 2: BocaVox Support Maintenance](#)

13.a Describe your contractually guaranteed service levels for system availability.

[See Attachment 1: BocaVox SLA](#)

13.b Describe your maintenance procedures and maintenance windows.

[See Attachment 1: BocaVox SLA](#)

13.c Describe your service-level objectives and corresponding service-level credits.

[See Attachment 1: BocaVox SLA](#)

13.d Describe your service credit requests and payment procedure.

[Payment for support and maintenance of systems is received by BocaVox on a monthly basis. Support includes:](#)

- [Dedicated implementation project manager](#)
- [Access to Zen Desk trouble ticketing system for system administrators](#)
- [Live phone support during business hours](#)
- [Phone support available after hours and on weekends for level 1 and 2 severity issues.](#)

14) Technical Specifications

- 14.a Generally, describe your architecture, including identification of major third-party platforms or vendors on which the application relies (e.g., AWS/Azure).
The WebApp (mix of ASP.NET WebForms and ASP.NET WebAPI with Angular) is hosted on the WebFarms inside of Azure. The SQL Server databases are running also on Azure cloud, having the host machine managed by them.
- 14.b What is the database you use for your system?
SQL Server on Azure (Managed instance)
- 14.c Identify third-party cyber-security certifications and attestations (e.g., ISO 27001, CSA, etc.), including their relevant scope.
The SQL Servers are running over SQL Managed Instances on Azure, that means the host machine is managed by Microsoft, avoiding scenarios like ransomsware hijacking the databases. We've been configuring Azure to cover the compliances (NIST, ISO270001, HIPPA, FARPA, etc), decreasing the possible attack surfaces.
We offer encryption in transit and the option of encryption at rest and have many security measures in place including firewalls and perform periodic PEN testing.
- 14.d Describe your support for the system software, database, upgrades, and maintenance.
In addition to fixing bugs and client tickets, we are continually working to enhance and update Maestro. We pass these updates onto our clients for free. Six Major System Updates in 4 Years. BocaVox's quality assurance team thoroughly tests all enhancements prior to client updates to ensure proper functionality and mitigate potential bugs passing to client systems.
- 14.e Describe how applications are accessible over the internet using commonly available browsers, including the latest versions of Edge, Safari, Firefox, and Chrome.
Fully web based accessible on any device and fully responsive to any device /size.
- 14.f Describe how your application can be accessed through a mobile app, including Android and iOS devices.
Fully mobile ready student portal and administrative portal is device adaptable via responsive interface.
- 14.g Describe how your application is physically and logically secure by documenting system redundancy, daily backup of data, and same-day data restore of lost files with business continuity and disaster recovery provisions.
The Web Application and the Databases are hosted on Azure Cloud, with daily backups, allowing to restore whenever is required. The files are hosted inside of a database encrypted by a key that is different for each client (each client has a Database "Document Server").

14.h Describe how the application allows multiple participants across multiple colleges to be logged in and using the system simultaneously. The application must support the principles of “Universal Design” (i.e., be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design). [Maestro provides an organizational hierarchical model that allows users to be part of one or many organizations in the application and each organization can have several campus locations. Users in Maestro can have multiple roles across multiple organizations and switch roles as needed. Classes can be scheduled in specific facilities, locations and time slots across the entire ecosystem.](#)

15) Access Barriers

Describe your systems ability to address the access barrier:

15.a The solution meets the Web Content Accessibility Guidelines (WCAG) 2.1 accessibility standards.

[The Maestro SIS front-end student portal meets ADA accessibility guidelines.](#)

15.b The solution is screen-reader-accessible.

[Yes.](#)

15.c The solution allows the user to customize the look of the display (color, size, and so on).

[Yes](#)

15.d The solution preserves accessibility features and markup when importing or exporting content.

[Yes. All data imports adhere to accessibility guidelines.](#)

15.e The solution meets local, State, and national-level accessibility regulations (for example, The Maine Human Rights Act ("MHRA") and, in the US, Section 508 of the Rehabilitation Act of 1973 and its implementing regulations).

[Yes](#)

16) Professional Services

Describe any pre-installation services offered:

16.a Describe the general implementation process, including the period from procurement to go-live, technical support, and end-user training. Highlight aspects relevant to MCCS's current state.

What will a Maestro SIS Implementation look like?

3–6-month timeline depending on complexity of organizations workflows & additional customizations needed.

PHASE 1

- Upon becoming a client BocaVox Implementation team will immediately schedule a kick off meeting with school leadership and technology team.

- BocaVox implementation team will include the BV Project Manager and support team assigned to the client, and when needed, may include a member of the BV Senior Software engineering team.
- Bocavox Project Manager and his/her team schedule recurring meetings between both parties for the duration of implementation. These meetings will consist of both fact finding and consultative services by the BocaVox team ensuring every need is met by the client in the most efficient manner possible. In many cases, your Bocavox Project Manager's expertise will devise new ways to tackle previous challenges, bringing to the table solutions and strategic roadmaps that ultimately save time and money.
- BocaVox will deliver SRS (Software Requirement Specifications) documents to client's implementation team, as well as a Gantt chart for a timeline of action items for Bocavox and Client team.
- The SRS document will provide a roadmap for weekly or bi-weekly discovery meetings between client Implementation Team and BocaVox.
- Bocavox will provide continuous assistance to help the school complete their SRS documentation and gather detailed specifications of any custom requirements needed for the project. Upon completion and approval of the SRS, the first sprint of development will commence.
- Deployment of Maestro SIS in beta release, configured for the client and tested by BocaVox QA team in a BocaVox staging server. This first release will include the majority of the functionalities described in the SRS.
- BocaVox provides training on Maestro SIS on Phase 1 of the beta release for school implementation team.
- Client team will conduct testing under direction of school project manager, spending two to four weeks working in the staging environment. Feedback for changes or enhancements will be documented by BocaVox in the SRS documents and the stage environment updated accordingly.

PHASE 2

- Deployment of Phase II release configured and customized in a BocaVox staging server
- Second training session for staff on the Maestro SIS production release.
- Upon formal approval of the staging/test site by client, your site will GO LIVE!
- The client's Systems Admin will begin using BocaVox trouble ticket system, and receive ongoing technical support through dedicated systems admin, as needed.

What expectations should we have for our school implementation team?

- Assign a Project Manager who can communicate clearly the needs of each division of the organization and meet 1-2 times per week with Bocavox implementation team
- Introduce the BocaVox Integrations team to the institution's representatives of all 3rd party systems requiring integrations, and get firm commitments from each party on due dates for communicating the necessary specifications, establishing firm delivery

timelines with each party.

- Migrate data from former systems into Maestro using bulk import templates provided by Bocavox (per client need and request Bocavox may facilitate this data transfer)
- Test configurations and processes in staging environment

16.b Include a notional project timeline covering major aspects and phases of a product implementation, such as key milestones, activities, and responsible parties. [See above.](#)

16.c Describe how end-user training is incorporated in implementation. [See above.](#)

17) Roadmap and Vision

Describe your product vision and roadmap. Include discussion of SaaS/cloud-native development, strategy for integration with other tools and products, and approach to Customization versus Configuration.

[Maestro has been in constant development since its inception. Due to the varying needs of our clients and a changing world, we strive to offer the most cutting-edge technology through continual growth and development. To ensure all of our clients receive the best we have to offer throughout the relationship, we pass on updates and enhancements of the system at no additional cost to our clients multiple times per year. Our move to the AZURE Cloud was a very positive and recent advancement along with a full UI renovation into angular. Integrations are a specialty of ours and we believe a strong integration is a key basis for truly streamlining processes and reducing manual tasks. While we are able to make just about any customization as requested by a client, large and small, including building out full new modules and features, we have made Maestro a highly configurable system with over 400 adjustable parameters that can be changed rather quickly by both BocaVox and system admins on the client side. A few common areas our clients take advantage of this are in layout and display of grids, workflows, and the ability to create new fields across the system \(can be done by the client\), creating new data sources as needed. We believe the more we strategize with our clients on their needs the more we can jointly develop solutions that are accomplished by configurations over customizations, therefore reducing waiting times and additional costs.](#)

18) References

Please provide three recent community college or university system references with the application version and its date in production. One of these references must speak to the implementation experience and support experience within the last two years.

- [Tennessee Board of Regents, 2013, Maestro SIS 4.3](#)
- [Nations University, 2018, Maestro SIS 4.4](#)
- [International House of Prayer University, 2018, Maestro SIS 4.4](#)
- [Pickens Technical College, 2021, Maestro SIS 4.5](#)

19) Attachment 1: BocaVox SLA

Severity 1 Indicators (Ultra Critical)	Examples	BocaVox SLA
<ul style="list-style-type: none"> • Maestro SIS is down • Major site down • Outage of critical shared component(s) • Unable to access courses • Could trigger cutover to Disaster Recovery site 	<ul style="list-style-type: none"> • Entire Maestro SIS site down • Users cannot login 	Immediately (if within normal work hours) or within 6 hours if after work hours
Severity 2 Indicators (Critical)		
<ul style="list-style-type: none"> • Executive request • Students cannot access courses • Large number of users affected • Major component(s) unavailable for use (reports, etc.) • Many or major files lost • Major loss of functionality • Issue affects integrity of student data, student history, etc. • No immediate, viable, or reasonable work around available 	<ul style="list-style-type: none"> • Staff Cannot perform critical job function such as enroll students • Application import not functioning properly • Partner cannot see their role 	Immediately (if within normal work hours) or within 12 hours if after work hours
Severity 3 Indicators (Serious)		
<ul style="list-style-type: none"> • Moderate visibility • Moderate number of customers affected • Potentially affects online commitment • Serious loss of functionality • Potentially affects production • Limited use of product or component • Component continue to fail – intermittently down for short periods, but repetitive • Problems may have a possible work around 	<ul style="list-style-type: none"> • Users cannot perform searches, perform updates to student information, or run a query • System is slow • Reports unavailable or not updated • Filter not putting results as expected 	24 to 48 hours
Severity 4 Indicators (Minimal)		
<ul style="list-style-type: none"> • Low or no customer impact • Limited use of product or component • Single to small number of customers affected • Minimal loss of functionality • Workaround unavailable 	<ul style="list-style-type: none"> • Pick list value needs to be removed or changed • An issue having minimal effect on customers or productivity 	5 to 10 business days to provide a solution or a work around, if fix is release dependent

20) Attachment 2: BocaVox Support & Maintenance

BOCAVOX SUPPORT & MAINTENANCE

WHAT IS INCLUDED?

SUPPORT

- Dedicated Implementation Project Manager
- Access to Zen Desk trouble ticketing system for System Administrators
- Live phone support during business hours
- Phone support available after hours and on weekends for level 1 and 2 severity issues

"The Maestro SIS team has not only been responsive and gracious with their time and energy but major contributors in helping us think most clearly through potential issues and problems, and of course, proactive solutions. They have ceased to be vendors and have truly become strategic partners and peers." **ACADEMICA VIRTUAL SCHOOLS**

"The entire BocaVox staff has been responsive to every request & willing to handle requests on short notice to get us out of jams (that they didn't cause)."

QUAKER DIGITAL ACADEMY

"I have found that the programmers at BocaVox to be very responsive to our needs & very easy to work with. It's also a plus, that there are multiple programmers, so the turn-around time is excellent. Bocavox even built into the program an internal error check, so our Data Pipeline submissions come back very clean, even on the first try!" **GOAL ACADEMY**

MAINTENANCE

6 Major System Updates in 4 Years

The BocaVox Quality Assurance team thoroughly tests all enhancements prior to client updates to ensure proper functionality and mitigate potential bugs passing to client systems.

- **New User Interface with ongoing updates**
- **Enrollment Automation Process**
 - Course requests can be bulk enrolled with automatic selection of the best available section by Maestro using balance mode, round robin mode, strategy mode or in the order the section is displayed, considering section and teacher capacity.
- **Advanced Password Security Measures**

- **Maestro API Enhancement**
- **Forms Management**
 - Work-flow management with the ability to associate a form to “handlers” (a specific user or group of users) in order to process the workflow dictated by the form template. Handlers will only see the forms associated to them and they can re-associate the form if necessary.
- **Special Needs Feature Enhancements**
 - Color code markers and tooltips for quick identification on student grid.
- **Enrollment Comments and Report Card/Transcript Notes**
- **Automated Report Card Distribution Process**
- **CRM and Lead Enhancements**
 - New capability to assign Lead Agents to incoming prospects
 - SMS Text Communication to Leads
 - Automated message templates for marketing campaigns based on number of days after lead creation, based on status of lead changes, based on scheduled events.
- **Billing Ledger Enhancements**
 - Bulk invoicing of Purchase Orders for POs with Payment Plans
 - Ability to add negative purchase order (PO) items to PO to allow discounts on PO and create invoices with the total discounted amount of the PO
 - Enhanced payment tracking for late and delinquent invoices with automated late fees. Define a fixed amount or a percentage to be charged as a late fee associated with each invoice. The charge can incur one time, daily, weekly or monthly, starting a number of days past either DELINQUENT date or DUE date.