

SHIP TO: LOUISE BUTLER
 3211 PROVIDENCE DRIVE
 LIB215
 ANCHORAGE AK 99508

UNIVERSITY OF ALASKA ANCHORAGE

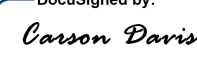
PROCUREMENT SERVICES
 3211 PROVIDENCE DRIVE
 ANCHORAGE AK 99508
 Tele: (907)786-6500 Fax: (907)786-6519

SEND ORIGINAL AND ONE (1) COPY OF INVOICE

UNIVERSITY OF ALASKA ANCHORAGE
 ACCOUNTS PAYABLE
 PO BOX 141609
 ANCHORAGE AK 99514-1609
 Tele: (907)786-1445 Fax: (907)786-4827

PURCHASE ORDER	
NO. P0546616	DATE: <u>09/08/20</u>
THIS NUMBER MUST BE SHOWN ON ALL INVOICES, PACKAGES, CORRESPONDENCE, ETC.	

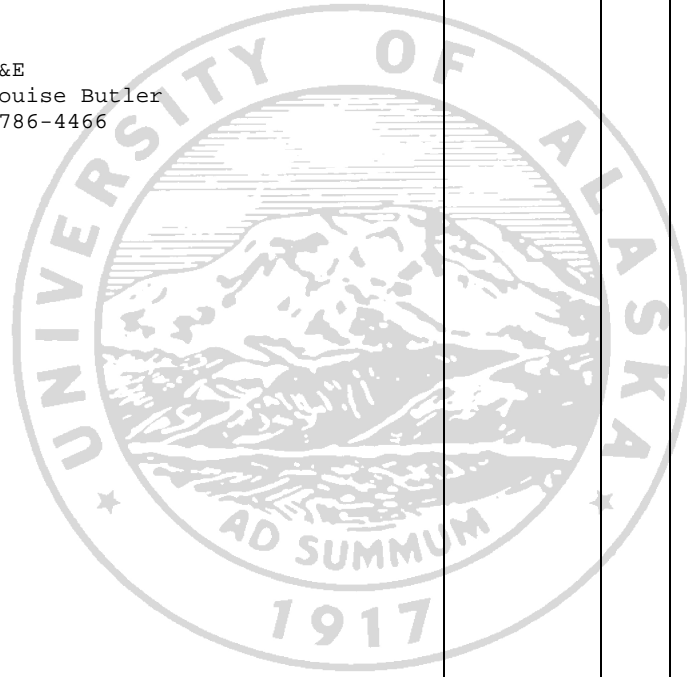
Vendor ID NO: 30991394
TO: CAREERAMERICA LLC
 PO BOX 7139
 BOULDER CO 80306

DocuSigned by:

 22AF21CD1FD9458...
 Procurement Officer September 8, 2020
 Date

PURCHASE AUTHORIZED ONLY WHEN SIGNED ABOVE BY THE AUTHORIZED AGENT.

"Unless otherwise superseded, vendor shall comply with University of Alaska Terms and Conditions of Purchase Order, located at www.alaska.edu/swproc/downloads/terms.pdf"

SHIP VIA	F.O.B. TERMS	TERMS			
Vendor	Destination	Net 30			
DELIVERY DATE	BUYER NAME	TIN #92-6000147			
08/14/23	Carson Davis	Tax Exempt No A-125217			
ITEM NO.	DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	EXTENDED PRICE
1	Software License: Chatbot for use with Advising For the Period: August 15, 2020 - August 14, 2023 Reference attached Contract of Service, Invoice, Sole Source Statement and End User License Agreement. UAA Department: AI&E Primary Contact: Louise Butler Phone Number: 907 786-4466	3.00	YR	5,000.0000	15,000.00
TOTAL					15,000.00



REQUEST FOR ALTERNATIVE PROCUREMENT

1. Requesting Dept. AI & E eLearning Services	2. Contact Person Louise Butler	3. Phone 786-4466	4. Req or PO # R0324663
---	---	-----------------------------	-----------------------------------

5. Proposed Contractor Career America LLC (Ocelot)	6. Amount \$ 16,000.00
--	----------------------------------

7. Type of Request (select all that apply, provide full explanation in block 9 and document price reasonableness in block 10.)

Brand Name
 Exempt under AS 36.30
 Sole Source
 Other: Exemptions-Formal Comp.
 Emergency
 Limited Competition
 Solicitation

8. Reason for soliciting only Sole Source/Brand Name (select all that apply)

Compatible Equipment
 Copyright Material
 Dues/Fees
 Educational Material
 Only Local Supplier
 Replacement Parts/Spares
 Research Products
 Utilities
 Other:

9. Justification (Explain the facts, circumstances for request)

University of Alaska Procurement Manual 13.1(a)(2): Royalties, License & Fees customarily charged for use, performance, or temporary access to works, programs, software, or other copyrighted material.

Software- Chatbot for use with Advising

This order issued for payment for the period: August 15, 2020 - August 14, 2021

Reference attached Contract of Service, Invoice, Sole Source Statement and End User License Agreement.

Note: Attach additional sheets, department memos, and/or findings and determinations when necessary for full justification.

10. Price reasonableness based on (select one):
Commercial Catalog/Published Price List

If Established Market Price:

Means of Verification:

If Commercial Catalog/Published Price List:

Indicate discount % (if used):

N/A

If Value Analysis:

If Comparison with prior purchases:

Vendor:

PO #:

If other, set forth specific reasons:

(attach additional information as required)

11. Recommended by: DocuSigned by:
Carson Davis Date: 09/08/2020

Approved: Per University of Alaska Procurement Manual Date: Adopted February 17, 2003



CONTRACT OF SERVICE

The Contract of Service encompasses the attached Invoice, Sole Source Letter, and End User License Agreement, which are incorporated in this Contract of Service by reference. The Contract of Service is an agreement entered into between University of Alaska - Anchorage and Ocelot (CareerAmerica, LLC) to begin on 8/15/2020. Pricing as offered assumes contract approval on or before Contract Start Date.

1. TOTAL CONTRACT

Item	Quantity	Description	Unit Amount	Total Amount
Chatbot: Advising	3.00	Chatbot for use with Advising	\$5,000.00	\$15,000.00
Chatbot SET-UP Fee	1.00	One-time Set-Up Charge for Chatbot	\$1,500.00	\$1,500.00
Discount: Set-Up Fee Waived	1.00	Set-Up Fee has been waived	\$-1,500.00	\$-1,500.00

Shipping & Handling 0.00

Sales Tax 0.00

TOTAL AGREEMENT PRICE \$15,000.00

Additional Department Upgrade for Academic Advising Chatbot. 3 Year Agreement, Term: 8/15/2020 - 8/14/2023

\$1,500 Setup Fee Waived with 3 Year Agreement.

2. ORDER ADD-ONS

This contract includes the flexibility to order additional services – including but not limited to custom developed technology solutions - within the Term of this agreement. Item(s) will be invoiced separately and will be bound to this agreement, or a new agreement, as indicated by Ocelot.

3. TERM

Start Date: 8/15/2020 End Date: 8/14/2023

4. PAYMENT SCHEDULE

Due Date	Amount
9/5/2020	15,000.00

Checks made payable to CareerAmerica, LLC

5. RENEWAL CONTRACT OPPORTUNITY

This contract will automatically renew at the conclusion of the term. Client may opt-out of renewal by notifying Ocelot in writing at least 30 days prior to the conclusion.

6. PRICE CAP ON RENEWAL CONTRACT

At the conclusion of this contract, the pricing for the current items ordered will increase by no more than 6%.

7. SIGNATURES

University of Alaska - Anchorage

Ocelot

DocuSigned by:
Carson Davis
22AF21CD1FD9458...



Signature

Carson Davis	Name	Damon Vangelis
Senior Contracting Officer	Title	CEO
September 8, 2020	Date	8/5/2020



INVOICE

CareerAmerica, LLC
PO Box 7139
Boulder, CO 80306

Invoice #	Invoice Date	Payment Due Date	PO#
0070-03	8/5/2020	9/5/2020	

Bill To:

University of Alaska - Anchorage
P.O. Box 141608
Anchorage, AK 99514-1608

Contract Services Description

Item	Quantity	Description	Unit Amount	Total Amount
Chatbot: Advising	3.00	Chatbot for use with Advising	5,000.00	15,000.00
Chatbot SET-UP Fee	1.00	One-time Set-Up Charge for Chatbot	1,500.00	1,500.00
Discount: Set-Up Fee Waived	1.00	Set-Up Fee has been waived	-1,500.00	-1,500.00

Shipping & Handling 0.00

Sales Tax 0.00

AMOUNT DUE THIS INVOICE \$15,000.00

Additional Department Upgrade for Academic Advising Chatbot. 3 Year Agreement, Term: 8/15/2020 - 8/14/2023

\$1,500 Setup Fee Waived with 3 Year Agreement.

3-Year contract from 8/15/2020 - 8/14/2023

Payment Terms: Net 30 upon PO/Signed Contract

Phone # (303) 351-2546	Fax # (810) 958-5113	Email orders@ocelotbot.com
Website www.ocelotbot.com	Federal Tax ID 84-4047861	

Ocelot, FATV, GetAnswers, GetSAP, and GetSAP+ are services of Career America, LLC.
All payments should be made payable to CareerAmerica, LLC



To: Purchasing Department, University of Alaska - Anchorage
From: Damon Vangelis, CEO
Date: 8/5/2020
Re: **Sole Source Nature of Ocelot Services**

.....

Ocelot's proprietary AI software platform enables educational institutions to explain critical and complex topics through a virtual interface. Our platform is Section 508 and WCAG 2.0 AA compliant. Ocelot's product includes five distinctive innovations that no other AI chatbot platform provides:

Patent-Pending "Explore" Interface

This unique AI-enabled interface provides chatbot users with supplemental guided conversations and advice, including relevant videos, website links, and related topics. Our pending patent is described in the Federal Registry as "Method and System for Predictive Q&A and Resource Suggestions". **Application No.: 16/888,680**

Explainer Video Library

Ocelot's chatbot is the only higher education focused bot that includes a comprehensive, 2,000+ online explainer video library covering all Title IV federal (and state) financial aid programs. These videos are updated regularly for compliance.

Out-of-the-Box Knowledge Base

Ocelot's chatbot has the deepest knowledge base of any higher education chatbot. It includes over 3,000 questions and answers that gives any institution an unrivaled starting point to build an effective AI chatbot.

Independent-Rated BLEU* Score

Ocelot's proprietary language algorithms score 52 (Spanish) and 54 (Simplified Chinese) on the BLEU evaluation rating. We have trained our AI with terminology consistent with the US Department of Education's vocabulary. This equates to master translation. Ocelot only pushes languages live once they score over 50. By comparison, automated translation services used by other chatbot providers (e.g. Google or Microsoft Translate) score in the 20s. *<https://en.wikipedia.org/wiki/BLEU>

Content Compliance Review

Ocelot is the only chatbot provider with a dedicated, 5-person content compliance review team. Ocelot's compliance team ensures that all content in the knowledge base covering Title IV (federal financial aid), Title IX (gender equity), and international programs are reviewed and maintained regularly to ensure accuracy.

Ocelot services are available on a subscription basis directly through us. Ocelot is owned by CareerAmerica, LLC. If you have any questions, please contact me at (303) 351-2546.

Sincerely,

END USER LICENSE AGREEMENT

NOTICE TO ALL USERS: Please read this contract carefully. By utilizing this service, you (the relevant entity) agree that this agreement is enforceable like any written contract signed by you.

1. Definitions

- a. "Service" means (a) all of the contents of the digital files, or other media (including electronic media) with which this Agreement is provided or such contents as are hosted by Ocelot (CareerAmerica, LLC) or any authorized partners, including but not limited to (i) computer information or software; (ii) related explanatory materials in printed, electronic, or online form ("Documentation"); and (b) upgrades, modified or subsequent versions and updates (collectively "Updates"), and Software, if any, licensed to you by CareerAmerica, LLC or an Authorized Partner as part of a maintenance contract or service subscription.
- b. "Use" or "Using" means to access, install, download, copy or otherwise benefit from using the Service.
- c. "Computer" means a device that accepts information in digital or similar form and manipulates it for a specific result based upon a sequence of instructions.
- d. "Ocelot" means a customizable online educational service created and serviced by CareerAmerica, LLC.

2. License Grant. Subject to the payment of the applicable license fees, and subject to the terms and conditions of this Agreement, CareerAmerica, LLC hereby grants to you a non-exclusive, non-transferable license to use a custom version of this Service on your website, for access and viewing by your faculty and staff, students, their family members and/or guardians, website visitors, and prospective students and their family members and/or guardians.

3. Term. Unless earlier terminated as set forth herein, this Agreement is effective for the term set forth in the Invoice and/or Contract of Service (if supplied), and may be extended for additional terms and pricing upon written agreement by the Parties. This Agreement will terminate automatically if you fail to comply with any of the limitations or other requirements described herein. Upon any termination or expiration of this Agreement, you must cease use of the Service and destroy all copies of the digital files and Documentation.

4. Start Date for Subscription. Subscription start dates shall be determined at the outset of the Agreement. Standard practice is for the subscription to begin the day the service is provided by CareerAmerica, LLC to the Client. However, at the discretion of CareerAmerica, LLC, the start date may be delayed in order to accommodate delays in launching by the Client. In the case of a delayed launch, start dates will be no later than 60 days from the date of the signed agreement or the receipt by CareerAmerica, LLC of a purchase order (whichever is later), unless otherwise agreed to by CareerAmerica, LLC at the outset of the Agreement.

5. Updates. This license is limited to the version of the Service delivered by CareerAmerica, LLC.

Throughout the Term of this Agreement, CareerAmerica, LLC shall make reasonable efforts to update the content of its service as needed to reflect material changes in applicable laws and/or regulations.

6. Ownership Rights. The Ocelot Service and its content are protected by United States copyright laws. CareerAmerica, LLC owns and retains all right, title, and interest in and to the Service, including all copyrights, patents, trade secret rights, trademarks, and other intellectual property rights therein. Your installation or Use of the Ocelot service does not transfer to you any title to the intellectual property in the Service, and you will not acquire any rights to the Service except as expressly set forth in this Agreement. You retain ownership in any content or material that is provided to CareerAmerica, LLC (referred to herein as the “Customer Materials”) and this Agreement does not provide CareerAmerica, LLC with any right to use such Customer Materials other than as necessary to perform its obligations under this Agreement.

7. Multiple Copies. If your service subscription includes multiple media format – such as DVD – you are not permitted to make copies of this media. You are permitted to use the Service on your institution’s website. However, you are not permitted to knowingly or intentionally permit another institution to access your Service.

8. Video Files. If you elect to utilize any video files provided by CareerAmerica, LLC through the file-share system, these files are only to be used as part of a school-based (closed) signage system for the term of your subscription. The video files are the property of CareerAmerica, LLC, and may not be duplicated, shared, or otherwise transmitted for use by a third party, or used online without prior written permission of CareerAmerica, LLC. If your subscription ends, you are not permitted to use the video files without the permission of CareerAmerica, LLC.

9. Restrictions. You may not sell, lease, license, rent, loan, resell, or otherwise transfer, with or without consideration, the Service or any of its knowledgebase or video content. You may not reverse engineer, decompile, or disassemble the Service, except to the extent the foregoing restriction is expressly prohibited by applicable law. You may not modify, or create derivative works based upon, the Service in whole or in part. You may not knowingly permit third parties (institutions, corporations, agencies, etc) to benefit from the use or functionality of the Service or the video clips. [This shall not be construed to refer to students benefiting intellectually from the educational benefit of the Service.] You may not back-up or otherwise copy any Ocelot digital content, or upload it to any other services or websites.

10. Warranty and Disclaimer. Subscriptions run for 1 year unless otherwise specified in the Agreement. Pro-rated subscriptions are permissible (e.g. your fiscal year is already in progress and you wish to purchase a subscription for the remaining months of your fiscal year), but must be specified in the Contract of Service or Invoice. CareerAmerica, LLC strives to make sure its Service is free from interruption; however, we make no guarantees that it will be error-free.

- a. **Uptime Commitment.** CareerAmerica, LLC will use commercially reasonable efforts to ensure that the Ocelot Service is available 24 hours a day, 7 days a week, with a monthly uptime goal of 99%. As used herein, “Ocelot Uptime” is calculated by taking the total number of minutes in a calendar month less the number of minutes of Ocelot Downtime in the calendar month, divided by the total number of minutes in the calendar month. As used

herein, “Ocelot Downtime” means if Ocelot Content and player are not being distributed or the Ocelot server is down, provided, however, that the following events will not be included as Ocelot Downtime: (a) causes beyond CareerAmerica LLC’s reasonable control, and (b) scheduled maintenance on the Ocelot Service (“Scheduled Maintenance”) up to 8 hours per calendar month (the “Maintenance Limit”); all Scheduled Maintenance shall either be conducted (i) between the hours of 12:00 AM (ET) and 6:00 AM (ET) or (ii) at any time after supplying Client with 3 days advance notice (the “Maintenance Windows”). Any Schedule Maintenance conducted in excess of the Maintenance Limit or outside of the Maintenance Windows shall be included in the calculation of Ocelot Downtime. Client will promptly notify CareerAmerica, LLC of any failure to receive Ocelot Content, whereupon CareerAmerica, LLC will evaluate the report in order to determine whether or not such failure qualifies as Ocelot Downtime.

- b. **Remedy for Excess Downtime.** If Ocelot Downtime is greater than 1% in a given month, Client shall be given an extension of the Agreement in the amount of downtime.

These provisions are Client’s sole and exclusive remedy for Ocelot Downtime and any failure to meet the terms of this Agreement. To request an Ocelot Service Extension credit, Client must contact CareerAmerica, LLC within 30 days after the end of the month in which the Service Extension Credit was earned. Multiple Ocelot Downtime events occurring simultaneously shall be considered a single Ocelot Downtime event.

11. Limitation of Liability. Under no circumstances and under no legal theory, whether in tort, contract, or otherwise, shall either party, or its authorized partners or suppliers, be liable to each other or to any other person for loss of profits, loss of goodwill, or any indirect, special, incidental, or consequential damages, or damages for gross negligence of any character including, without limitation, damages for loss of goodwill, work stoppage, computer failure or malfunction, or for any other damage or loss, even if either party has been advised of the possibility of such damages. In no event shall CareerAmerica, LLC, or its authorized partners, be liable for any damages in excess of the contract price for the Ocelot Service, if any.

12. Governing Law. This Agreement will be governed by and construed in accordance with the substantive laws in force in the State of Colorado, without regard to its conflict of law provisions.

13. Audit for Volume Licenses. CareerAmerica, LLC reserves the right to periodically audit (verify enrollment and review your use of Ocelot) your institution to ensure that you are using the appropriate Service license, and are not in violation of this Agreement.

14. Logos and Symbols. As a customer in good standing with CareerAmerica, LLC, your institution has the right to use our Ocelot logo on your website and/or any marketing materials you create so long as they are used to indicate current usage of Ocelot.

15. White Labeling. As a customer, you are permitted to “white label” Ocelot’s services. You agree that any name, avatar, or other branding that you utilize in this regard is taken at your own risk of any violations of trademarks, etc., and you also agree to bear the consequences of your choices. CareerAmerica, LLC bears no responsibility for any names, avatars, or branding that you choose to utilize.

16. Miscellaneous. This Agreement sets forth all rights for the user of our Services and is the entire agreement between the parties. This Agreement may not be modified except by a written addendum issued by a duly authorized representative of CareerAmerica, LLC. No provision hereof shall be deemed waived unless such waiver shall be in writing and signed by CareerAmerica, LLC. If any provision of this Agreement is held invalid, the remainder of this Agreement shall continue in full force and effect.

17. Customer Support. If you have any questions concerning these terms and conditions, please call (888) 704-9090 or request help through our website located at www.ocelotbot.com.



A NEW WAY TO SIGN IN - If you already have a SAM account, use your **SAM email** for login.gov.

[▶ Log In](#)

[Login.gov FAQs](#)

⚠ ALERT: SAM.gov will be down for scheduled maintenance Saturday, 08/15/2020 from 8:00 AM to 10:00 PM

⚠ ALERT: CAGE is experiencing intermittent service interruptions. SAM registrants may encounter an error validating a CAGE Code. If this happens, please try again later.

Search Results

Current Search Terms: CareerAmerica LLC*

Total records:0

[Save PDF](#) [Export Results](#) [Print](#)

Result Page:

Sort by [Relevance](#) Order by [Descending](#)

Your search for CareerAmerica LLC* returned the following results...

No records found.

Result Page:

[Save PDF](#) [Export Results](#) [Print](#)



IBM-P-20200717-1140
WWW2

- [Search Records](#)
- [Data Access](#)
- [Check Status](#)
- [About](#)
- [Help](#)
- [Disclaimers](#)
- [Accessibility](#)
- [Privacy Policy](#)
- [FAPIS.gov](#)
- [GSA.gov/IAE](#)
- [GSA.gov](#)
- [USA.gov](#)

This is a U.S. General Services Administration Federal Government computer system that is "FOR OFFICIAL USE ONLY." This system is subject to monitoring. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.



Re: Comment Added: UAA IT Support Ticket #525424 (Software Waiver | Chatbot)

Louise Butler <lbutler@alaska.edu>
To: Carson Davis <crdavis4@alaska.edu>
Cc: UAA IT Support Replies <uaa_itsupportreplies@alaska.edu>

Tue, Sep 8, 2020

So, Carson, after going through too many hands, John no longer has any concerns. See his email below.

Rob Carrillo

Fri, Sep 4, 8:16 AM (4 days ago)

to me

FYI

----- Forwarded message -----

From: John Zetterman <jmzetterman@alaska.edu>
Date: Thu, Sep 3, 2020 at 4:06 PM
Subject: Re: FYSAS Chatbot Procurement - Ticket #525424
To: Keith Berggren <khberggren@alaska.edu>
Cc: Heather Nash <hmnash@alaska.edu>, Rob Carrillo <rcarrillo@alaska.edu>

Keith, apologies. We no longer have any concerns and you can consider the request approved. I will update the ticket.

John Zetterman | Director - Infrastructure Services | IT Services | University of Alaska - Anchorage | 907-786-1256

Louise

On Thu, Aug 27, 2020 at 3:22 PM Carson Davis <crdavis4@alaska.edu> wrote:
Hello Louise and John,

To Louise:
I am sharing a question from John Zetterman regarding the chatbot software requested on R0324663. John wrote:

"Carson, we need more information about this request from AI&E. They indicate that IT support is not needed, however after looking through the documents provided it appears to me that help from IT could be necessary. Is it possible for us to set up a meeting with the vendor to answer our questions?"

Can your department provide any additional information to answer John's IT support question? If the information does not address these concerns, does AI&E have a preferred contact at CareerAmerica LLC for the purpose of establishing a meeting to discuss this matter?

On Thu, Aug 27, 2020 at 3:00 PM John Zetterman <notify@teamdynamixapp.com> wrote:

Carson, we need more information about this request from AI&E. They indicate that IT support is not needed, however after looking through the document provided it appears to me that significant help from IT could be necessary. Is it possible for us to set up a meeting with the vendor to answer our question?

Important Note: Do not reply to this email for anything that is not related to this ticket. If you have questions about another ticket or need to have a new ticket created please contact the UAA Technical Support Center. If you need to communicate with a UAA IT Services employee about something unrelated to this ticket please create a new email.

Ticket Details

Ticket Number: 525424
Title/For: Software Waiver | Chatbot
Created On: Wed 8/26/20 10:01 AM Alaskan Daylight Time
Created By: Joshua Barks
For additional information, View Ticket In Client Portal.

To comment on this item, reply to this email.

----TEAMDYNAMIX DO NOT ALTER OR REMOVE
THIS CODE----
r2JnKzQh25OItfGXCl04ExgheKlJ0/
DVasMjkNnbqhBuFKfuP69ozvl/
ASlaws5J3k9Wgr7I59uSyFluw9eOUK
kQk8aJ69ejoBvIKp9D4eiF5yeyBhl
INuicUEXkcyHGizvsTwp7qMcoetnBX
j5wHlmo7ia8ilxffa5tZxu2l3eY1nY
pS2aj483benZP8q3uT1+DTe+
WZJVbNhyc2fgxo38l0xA6BjnRq5wv+
Nb+0MLb6S+J2fCRmi+Ey4GeeUX5+
7YzxMUMuOKpUzjWfEYf6mKRn5XA0hushD+
oHu9shQSZbptamCBvrZy6DVRnCOh0d
TwAwLujEH8cmELHaTSW5TOPCgJ0QtW

9/8/2020

UA Mail - Re: Comment Added: UAA IT Support Ticket #525424 (Software Waiver | Chatbot)

----TEAMDYNAMIX DO NOT ALTER OR REMOVE
THIS CODE----

--
Regards,

Carson Davis
Senior Contracting Officer
University of Alaska Procurement and Contract Services
[3211 Providence Drive](#)
[Anchorage, AK 99508-4614](#)
Ph. 907-786-1341

UA PROCUREMENT & CONTRACT SERVICES IS OBSERVING THE GUIDANCE FROM UA ADMINISTRATION ON WORKING REMOTELY. STAFF WILL BE AVAILABLE BY EMAIL PHONE AT THEIR UA TELEPHONE NUMBERS.

UA PROCUREMENT & CONTRACT SERVICES WILL PROVIDE ADDITIONAL GUIDANCE REGARDING IN-PERSON AVAILABILITY AS CIRCUMSTANCES ALLOW.

THANK YOU FOR YOUR UNDERSTANDING DURING THIS TIME.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning
University Alaska Anchorage Staff Council Member
[3211 Providence Drive](#), LIB 213
Anchorage, AK 99508
907.786.4466

Project Description: First Year Student Advising and Success (FYSAS) – Chatbot

UAA Robust Online Learning (ROLL), Title III Grant
UAA First Year Student Advising & Success

Project Overview:

UAA's Robust Online Learning Title III Grant (ROLL) will coordinate work with the UAA Office of First Year Student Advising and Success (FYSAS) to launch a virtual chatbot service. The overall goal is for students to easily, with little searching on the students' part, connect to information regarding the first year advising process. The automated chat service, provided by the vendor, OCELOT, will assist in answering questions and providing resources to students inline with the information they are seeking. Similar services already exist on campus with the Financial Aid and Admissions offices within Student Affairs, using the same vendor. The timeline for implementation is 8-10 weeks and will include First Year Advisors as Subject Matter Experts (SMEs). SMEs will review base-line content provided by the vendor for accuracy based on the experiences with the UAA advising process.

Background:

Title III ROLL grant works to build infrastructure to help the institution offer online learning which reflects UAA's strategic priorities of addressing chronic problems (low graduation and retention rates overall and for students from underserved groups , enrollment and student credit hour improvement), meeting accreditation standards, and strengthening our financial stability. In the final year of the Title III grant the focus is on student success and support. This project will emphasize these goals by providing 24/7 virtual support to students and assist the university in its goals beyond the service years of the grant.

Expectations:

- ROLL will:
 - Maintain consistent communications with FYSAS and the vendor
 - Track deliverables to assist in meeting deadlines
 - Coordinate with UAA FYSAS for deployment of chatbot services into all website pages pertaining to the advising process.
 - Will coordinate a long-term procurement of services with the vendor using Title III grant funds.

- FYSAS will:

- SMEs review and provide feedback on questions and automated responses to advising services provided by the vendor.
- Identify any additional resources, materials, or information that should be added to the Chatbot.
- Conduct monthly analytic reviews of service and update preloaded responses as information changes.
- Provide Title III with analytic data regarding the implementation of service for the Title III Year 5 annual reporting process.
- Assume responsibility of maintaining chatbot service, including extending the contract (if deemed necessary) at the conclusion of the multi-year contract of services secured by the Title III grant team.

Resource Repository:

- *Title III Share-drive:*
 - *\Y5_Activity\Student Services\Chatbot Projects*
 - *Project Description_First Year Advising (FYSAS) – Chatbot*

Project Goals:

- Implement virtual chat services into FYSAS starting fall 2020.
- Provide students with answers to frequently asked questions regarding the first year advising process at UAA.
- Data repository on frequently asked questions focused on the advising process at UAA.

Project Deliverables

- OCELOT
 - Chatbot service online, 24/7, to students
- For FYSAS:
 - Online chat service available to students on the FYSAS webpage
- Title III Grant:
 - Contract for (3 years) of services for FYSAS.

Staffing & Collaboration:

- **ROLL Team:**
 - Keith Berggren (Title III Student Support Coordinator) will serve as the administrative coordinator between FYSAS and Vendor.
 - Rob Carrillo (Title III Activity Director) will coordinate the results for grant reporting purposes.

- Louise Butler (Grant Administration Support) will coordinate procurement of service contracts and purchase order payments.
- **ROLL Title III Grant Reviewer: Dr. Heather Nash, Project Director**
- **First Year Student Advising and Success:**
 - Eight First Year Advisors.
 - Valerie Robideaux; Director, First Year Student Advising & Success.
 - **Student Success: Dr. Claudia Lampman; VP for Student Success**

Equipment and Software:

- Chatbot software from OCELOT.
- UAA FYSAS Website:
 - <https://www.uaa.alaska.edu/academics/office-of-academic-affairs/first-year-advising/index.cshtml>

Budget:

Item	Amount
OCELT Chatbot Services: 3 year contract paid in full by Title III grant.	\$15,000.00
Total	\$15,000.00

Development Timeline

- **July**
 - Demo with the Vendor and FYSAS (TBD).
 - Finalize Project Description document with FYSAS.
 - FYSAS Completes the Set-up form
 - Approximately 30 minutes
 - Chatbot creation
 - Vendor creates the chatbot and admin system
 - OCELOT training for FYSAS.
 - Approximately 1 hr
- **Early-August**
 - FYSAS/Title III will test customization of chatbot
 - SMEs begin reviewing documentation provided by the vendor for launch of the services:
 - This contains up to 1,200 questions needing review.
 - Beta testing of service
 - Add additional questions aligning with UAA's unique environment.

- **Mid-August**
 - Launch of the chatbot
 - Approximately 1-2 hrs

Project Approval

We have reviewed the Project Description: First Year Student Advising and Success (FYSAS) - Chatbot, and support the design, development, and budget for the implementation of an online chatbot service project as outlined above. This project description is not a legally binding document, but reflects our collective understanding of the project and how it will proceed. The project’s timeline is subject to change as needed; if such happens, all stakeholders will be informed and reach agreement on new specifics.

DocuSigned by:
Heather M Nash
Dr. Heather Nash, Title III ROLL Project Director
B778EDEF6A214F1...

Date July 16, 2020
DocuSigned by:
Valerie Robideaux
Valerie Robideaux, Director, First Year Student Advising & Success
33F099839AB42C...

Date July 16, 2020
Dr. Claudia Lampman; VP for Student Success

DocuSigned by:
Claudia B Lampman
31F1C44ED84F499...
Date July 16, 2020



Carson Davis <crdavis4@alaska.edu>

Re: R0324663 CareerAmerica LLC

Lindsey Chadwell <Inchadwell@alaska.edu>

Fri, Aug 14, 2020 at 5:13 PM

To: Carson Davis <crdavis4@alaska.edu>

Cc: UAA Technical Support Center <uaa.techsupport@alaska.edu>, Louise Butler <lbutler@alaska.edu>

Hi Carson,

I don't have FERPA concerns based on the information provided.

Thanks,

Lindsey Chadwell
University Registrar
University of Alaska Anchorage
907-786-6190
Inchadwell@alaska.edu

On Fri, Aug 14, 2020 at 10:48 AM Carson Davis <crdavis4@alaska.edu> wrote:

Hello Lindsey and IT Services,

I am sending information on Chatbot software requested by AI&E. The product details are as follows:

Carson-

I've attached the Activity Description which details how the Chatbot will be used. Also, it is a virtual Q&A software, so no student data is being collected/used with this service.

Thanks,

Keith Berggren | *Manager**eLearning: Distance Student Services*

----- Forwarded message -----

From: **UAA Procurement Services** <uaa_procurement@alaska.edu>

Date: Thu, Aug 13, 2020 at 5:05 PM

Subject: Fwd: R0324663 CareerAmerica LLC

To: Carson Davis <crdavis4@alaska.edu>, Louise Butler <lbutler@alaska.edu>

Carson,

Attached is R0324663 that has been assigned to your buyer pool for processing.

Thanks

----- Forwarded message -----

From: **Louise Butler** <lbutler@alaska.edu>

Date: Thu, Aug 13, 2020 at 2:57 PM

Subject: R0324663 CareerAmerica LLC
To: UAA Procurement Services <uaa_procurement@alaska.edu>

Contract for 3 years licensing for Chatbot to be used with Advising/Student Services.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning
University Alaska Anchorage Staff Council Member
[3211 Providence Drive](#), LIB 213
Anchorage, AK 99508
907.786.4466

--

Regards,

Carson Davis
Senior Contracting Officer
University of Alaska Procurement and Contract Services
[3211 Providence Drive](#)
[Anchorage, AK 99508-4614](#)
Ph. 907-786-1341

UA PROCUREMENT & CONTRACT SERVICES IS OBSERVING THE GUIDANCE FROM UA ADMINISTRATION ON WORKING REMOTELY. STAFF WILL BE AVAILABLE BY EMAIL OR BY PHONE AT THEIR UA TELEPHONE NUMBERS.

UA PROCUREMENT & CONTRACT SERVICES WILL PROVIDE ADDITIONAL GUIDANCE REGARDING IN-PERSON AVAILABILITY AS CIRCUMSTANCES ALLOW.

THANK YOU FOR YOUR UNDERSTANDING DURING THIS TIME.



Carson Davis <crdavis4@alaska.edu>

Fwd: R0324663 CareerAmerica LLC

UAA Procurement Services <uaa_procurement@alaska.edu>

Thu, Aug 13, 2020 at 5:04 PM

To: Carson Davis <crdavis4@alaska.edu>, Louise Butler <lkbutter@alaska.edu>

Carson,

Attached is R0324663 that has been assigned to your buyer pool for processing.

Thanks

----- Forwarded message -----

From: **Louise Butler** <lkbutter@alaska.edu>

Date: Thu, Aug 13, 2020 at 2:57 PM

Subject: R0324663 CareerAmerica LLC

To: UAA Procurement Services <uaa_procurement@alaska.edu>

Contract for 3 years licensing for Chatbot to be used with Advising/Student Services.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning
University Alaska Anchorage Staff Council Member
3211 Providence Drive, LIB 213
Anchorage, AK 99508
907.786.4466

2 attachments **University of Alaska - Anchorage Ocelot Contract # 00002810 8-5-2020-2.pdf**
140K **R0324663.pdf**
20K



Carson Davis <crdavis4@alaska.edu>

FYSAS Chatbot Procurement - Ticket #525424

Keith Berggren <khberggren@alaska.edu>

Thu, Aug 27, 2020 at 9:32 PM

To: John Zetterman <jmzetterman@alaska.edu>, Nicholas Burrell <nick.burrell@ocelotbot.com>

Cc: Louise Butler <lbutler@alaska.edu>, Rob Carrillo <rcarrillo@alaska.edu>, Carson Davis <crdavis4@alaska.edu>

I've put this email together in an effort to answer questions John Zetterman (Director of Infrastructure Service) has about the virtual Chatbot (provided by OCELOT; Nick Burrell) and what assistance (if any) would be required by UAA IT Services. John and Nick, would your schedules support a meeting some time soon to address John's concerns?

I believe it is worth noting that UAA already has in operation two virtual Chatbots provided by OCELOT (Financial Aid & Admissions), and that the vendor will be the one building the Chatbot, which will be embedded into the CMS for FYSAS.

Thanks,

Keith Berggren | *Manager**eLearning: Distance Student Services*

Academic Innovations & eLearning

University of Alaska Anchorage

[3211 Providence Drive | Anchorage, AK 99508](#)

Tel: (907) 786-4492 | Fax: (907) 786-1008

[Website](#)[Twitter](#)[Email](#)



Carson Davis <crdavis4@alaska.edu>

Re: FYSAS Chatbot Procurement - Ticket #525424

Nicholas Burrell <nick.burrell@ocelotbot.com>

Fri, Aug 28, 2020 at 6:34 AM

To: Keith Berggren <khberggren@alaska.edu>

Cc: John Zetterman <jmzetterman@alaska.edu>, Louise Butler <lbutler@alaska.edu>, Rob Carrillo <rcarrillo@alaska.edu>, Carson Davis <crdavis4@alaska.edu>

Hi Keith and John,

Thank you for reaching out and your questions. I am happy to meet. I have time today if that would work for folks?

Also, we may not need to meet as the only possible assistance needed from IT would be to copy and paste the lines of Javascript to get the chatbot on the webpages you want for 1st Year Advising. If the individual office can update their own webpages then there would be no IT support needed at all. This may answer your question and not result in the need for a meeting. If you do want to meet, please let me know and we can try and set up something for today if possible. (Next week will be challenging for me to set up a meeting, but we could also meet after September 7th if you still want to connect and are unable to meet today).

~Nick

Nicholas Burrell

VP, School Partnerships

Ocelot

203.206.1921

nick@ocelotbot.com

University Business Top Product Winner

This email and any attached files are confidential and intended solely for the intended recipient(s). If you are not the named recipient you should not read, distribute, copy or alter this email. Any views or opinions expressed in this email are those of the author and do not represent those of Ocelot. Warning: Although precautions have been taken to make sure no viruses are present in this email, the company cannot accept responsibility for any loss or damage that arise from the use of this email or attachments.

On Thu, Aug 27, 2020 at 11:32 PM Keith Berggren <khberggren@alaska.edu> wrote:

I've put this email together in an effort to answer questions John Zetterman (Director of Infrastructure Service) has about the virtual Chatbot (provided by OCELOT; Nick Burrell) and what assistance (if any) would be required by UAA IT Services. John and Nick, would your schedules support a meeting some time soon to address John's concerns?

I believe it is worth noting that UAA already has in operation two virtual Chatbots provided by OCELOT (Financial Aid & Admissions), and that the vendor will be the one building the Chatbot, which will be embedded into the CMS for

FYSAS.

Thanks,



Keith Berggren | *Manager*

eLearning: Distance Student Services

Academic Innovations & eLearning

University of Alaska Anchorage

[3211 Providence Drive | Anchorage, AK 99508](#)

Tel: (907) 786-4492 | Fax: (907) 786-1008

[Website](#)

[Twitter](#)

[Email](#)



Carson Davis <crdavis4@alaska.edu>

Re: R0324663 CareerAmerica LLC

Keith Berggren <khberggren@alaska.edu>
To: Carson Davis <crdavis4@alaska.edu>

Mon, Aug 24, 2020 at 1:26 PM

Carson-
I was wondering if there has been an update on this at all?

Thanks,



Keith Berggren | *Manager*
eLearning: Distance Student Services
Academic Innovations & eLearning
University of Alaska Anchorage
[3211 Providence Drive | Anchorage, AK 99508](#)
Tel: (907) 786-4492 | Fax: (907) 786-1008

[Website](#)[Twitter](#)[Email](#)

On Fri, Aug 14, 2020 at 10:47 AM Carson Davis <crdavis4@alaska.edu> wrote:
Thank you Keith, I will get this review in process with the Registrar and IT.

On Fri, Aug 14, 2020 at 10:21 AM Keith Berggren <khberggren@alaska.edu> wrote:

Carson-
I've attached the Activity Description which details how the Chatbot will be used. Also, it is a virtual Q&A software, so no student data is being collected/used with this service.

Thanks,



Keith Berggren | *Manager*
eLearning: Distance Student Services
Academic Innovations & eLearning
University of Alaska Anchorage
[3211 Providence Drive | Anchorage, AK 99508](#)
Tel: (907) 786-4492 | Fax: (907) 786-1008

[Website](#)[Twitter](#)[Email](#)

On Fri, Aug 14, 2020 at 10:15 AM Rob Carrillo <rcarrillo@alaska.edu> wrote:
FYI

----- Forwarded message -----
From: **Louise Butler** <lbutler@alaska.edu>

Date: Fri, Aug 14, 2020 at 9:50 AM
Subject: Fwd: R0324663 CareerAmerica LLC
To: Rob Carrillo <rcarrillo@alaska.edu>

Please answer Carson's questions, so the purchase can proceed.

----- Forwarded message -----

From: **Carson Davis** <crdavis4@alaska.edu>
Date: Fri, Aug 14, 2020 at 8:48 AM
Subject: Re: R0324663 CareerAmerica LLC
To: Louise Butler <lbutler@alaska.edu>

Hello Louise,

Thank you for the documentation. To help IT and the Registrar with their software review, can your department please provide the following details on this product?

Software Description: (general overview and description of how the software will be used)

Student Data: Will any student data be used in this software? If so, please explain what is being used and in what capacity.

On Thu, Aug 13, 2020 at 5:05 PM UAA Procurement Services <uaa_procurement@alaska.edu> wrote:
Carson,

Attached is R0324663 that has been assigned to your buyer pool for processing.

Thanks

----- Forwarded message -----

From: **Louise Butler** <lbutler@alaska.edu>
Date: Thu, Aug 13, 2020 at 2:57 PM
Subject: R0324663 CareerAmerica LLC
To: UAA Procurement Services <uaa_procurement@alaska.edu>

Contract for 3 years licensing for Chatbot to be used with Advising/Student Services.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning
University Alaska Anchorage Staff Council Member
[3211 Providence Drive](#), LIB 213
Anchorage, AK 99508
907.786.4466

--
Regards,

Carson Davis
Senior Contracting Officer
University of Alaska Procurement and Contract Services
[3211 Providence Drive](#)
[Anchorage, AK 99508-4614](#)
Ph. 907-786-1341

UA PROCUREMENT & CONTRACT SERVICES IS OBSERVING THE GUIDANCE FROM UA ADMINISTRATION ON WORKING REMOTELY. STAFF WILL BE AVAILABLE BY EMAIL OR BY PHONE AT THEIR UA TELEPHONE NUMBERS.

UA PROCUREMENT & CONTRACT SERVICES WILL PROVIDE ADDITIONAL GUIDANCE REGARDING IN-PERSON AVAILABILITY AS CIRCUMSTANCES ALLOW.

THANK YOU FOR YOUR UNDERSTANDING DURING THIS TIME.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning
University Alaska Anchorage Staff Council Member
[3211 Providence Drive](#), LIB 213
Anchorage, AK 99508
907.786.4466

--

Rob Carrillo
Title III Activity Director
UAA Academic Innovations & eLearning
University of Alaska Anchorage
907-786-1725 office
907-885-7738 mobile

--
Regards,

Carson Davis
Senior Contracting Officer
University of Alaska Procurement and Contract Services
[3211 Providence Drive](#)
[Anchorage, AK 99508-4614](#)
[Ph. 907-786-1341](#)

UA PROCUREMENT & CONTRACT SERVICES IS OBSERVING THE GUIDANCE FROM UA ADMINISTRATION ON WORKING REMOTELY. STAFF WILL BE AVAILABLE BY EMAIL OR BY PHONE AT THEIR UA TELEPHONE NUMBERS.

UA PROCUREMENT & CONTRACT SERVICES WILL PROVIDE ADDITIONAL GUIDANCE REGARDING IN-PERSON AVAILABILITY AS CIRCUMSTANCES ALLOW.

THANK YOU FOR YOUR UNDERSTANDING DURING THIS TIME.



Carson Davis <crdavis4@alaska.edu>

Re: R0324663 CareerAmerica LLC

Keith Berggren <khberggren@alaska.edu>

Fri, Aug 14, 2020 at 10:20 AM

To: Carson Davis <crdavis4@alaska.edu>

Cc: Louise Butler <lbutler@alaska.edu>, Rob Carrillo <rcarrillo@alaska.edu>

Carson-

I've attached the Activity Description which details how the Chatbot will be used. Also, it is a virtual Q&A software, so no student data is being collected/used with this service.

Thanks,

Keith Berggren | *Manager**eLearning: Distance Student Services*

Academic Innovations & eLearning

University of Alaska Anchorage

[3211 Providence Drive | Anchorage, AK 99508](#)

Tel: (907) 786-4492 | Fax: (907) 786-1008

[Website](#)[Twitter](#)[Email](#)

On Fri, Aug 14, 2020 at 10:15 AM Rob Carrillo <rcarrillo@alaska.edu> wrote:

FYI

----- Forwarded message -----

From: **Louise Butler** <lbutler@alaska.edu>

Date: Fri, Aug 14, 2020 at 9:50 AM

Subject: Fwd: R0324663 CareerAmerica LLC

To: Rob Carrillo <rcarrillo@alaska.edu>

Please answer Carson's questions, so the purchase can proceed.

----- Forwarded message -----

From: **Carson Davis** <crdavis4@alaska.edu>

Date: Fri, Aug 14, 2020 at 8:48 AM

Subject: Re: R0324663 CareerAmerica LLC

To: Louise Butler <lbutler@alaska.edu>

Hello Louise,

Thank you for the documentation. To help IT and the Registrar with their software review, can your department please provide the following details on this product?

Software Description: (general overview and description of how the software will be used)

Student Data: Will any student data be used in this software? If so, please explain what is being used and in what capacity.

On Thu, Aug 13, 2020 at 5:05 PM UAA Procurement Services <uaa_procurement@alaska.edu> wrote:

Carson,

Attached is R0324663 that has been assigned to your buyer pool for processing.

Thanks

----- Forwarded message -----

From: **Louise Butler** <lkbutler@alaska.edu>

Date: Thu, Aug 13, 2020 at 2:57 PM

Subject: R0324663 CareerAmerica LLC

To: UAA Procurement Services <uaa_procurement@alaska.edu>

Contract for 3 years licensing for Chatbot to be used with Advising/Student Services.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning

University Alaska Anchorage Staff Council Member

[3211 Providence Drive](#), LIB 213

Anchorage, AK 99508

907.786.4466

--

Regards,

Carson Davis

Senior Contracting Officer

University of Alaska Procurement and Contract Services

[3211 Providence Drive](#)

Anchorage, AK 99508-4614

Ph. 907-786-1341

UA PROCUREMENT & CONTRACT SERVICES IS OBSERVING THE GUIDANCE FROM UA ADMINISTRATION ON WORKING REMOTELY. STAFF WILL BE AVAILABLE BY EMAIL OR BY PHONE AT THEIR UA TELEPHONE NUMBERS.

UA PROCUREMENT & CONTRACT SERVICES WILL PROVIDE ADDITIONAL GUIDANCE REGARDING IN-PERSON AVAILABILITY AS CIRCUMSTANCES ALLOW.

THANK YOU FOR YOUR UNDERSTANDING DURING THIS TIME.

--

Louise Butler | Operations Manager | UAA Academic Innovation and eLearning

University Alaska Anchorage Staff Council Member

[3211 Providence Drive](#), LIB 213

Anchorage, AK 99508

907.786.4466

--

Rob Carrillo
Title III Activity Director
UAA Academic Innovations & eLearning
University of Alaska Anchorage
907-786-1725 office
907-885-7738 mobile

 **Project Description_First Year Advising (FYA) – Chatbot (1).pdf**
261K



University of Alaska Requisition

REQ Num: **R0324663**

Page: 1

Requestor: Louise Kay Butler
 Organization: PRO AI&e Administrative Services

Phone Number: 907 786-4466

Ship To Address: 3211 Providence Drive
 LIB215
 Anchorage AK 99508
 ATTN: Louise Butler

Delivery Dt: 08/15/20

Item	Item Description / Text Notes / Vendor Information	Quantity	UOM	Unit Price	Extended Cost
	New Vendor Name: . Address: . . City/State/Zip: Contact: Phone: Fax: Tax ID (if known): Any other information: Email:				
1	Chatbot License VENDOR: 30991394 CareerAmerica LLC	3.00	YR	5,000.0000	15,000.00
Requisition Total:					15,000.00

Item Num	Seq Num	Fisc Yr	Fund-Orgn-Acct-Prog Code	Accounting Rec Amount	Grant Code	Grnt Type	Sponsor ID	Agency ID	CFDA Code
1	1	21	243543-14550-4015-4242AC	\$15,000.00	G00010511	G	P031A150088-19	FEDUC010	84.031