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**REQUEST FOR PROPOSAL**

**For**

**INTEGRATED SUBSTITUTE MANAGEMENT  
SOFTWARE INCORPORATING AUTOMATED  
ABSENCE TRACKING AND SUBSTITUTE  
PLACEMENT**

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**Request for Proposals Issued: August 10, 2015**

**Deadline for Submittal of Proposals: September 23, 2015**

# **REQUEST FOR PROPOSALS FOR INTEGRATED SUBSTITUTE MANAGEMENT SOFTWARE INCORPORATING AUTOMATED ABSENCE TRACKING AND SUBSTITUTE PLACEMENT**

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## **I. INTRODUCTION**

The Sacramento City Unified School District (“District” or “SCUSD”) is seeking proposals from qualified firms who can provide the District with absence and substitute management software, along with the professional services necessary to implement said system. This software must meet the requirements set forth in this RFP, including the ability to manage and track absences, and associated substitute utilization from initial hire to placement in a position. The solution must be flexible and scalable in order to meet the District’s future financial planning, implementation, operational and reporting needs with regard to absence reporting, substitute management, tracking and placement.

The solution offered must be specifically designed for use in an educational setting and provide staff with the means by which they would report absences and request a substitute employee to work on their behalf. The solution offered must provide automated substitute placement when absences require a substitute. Employees may utilize the system to report absences to the system that will not require a substitute.

The system must offer 24-hour access; be both web-based and accessible via telephone; utilize e-mail, smart phone apps and voice messaging tools as appropriate. Locally installed/hosted and externally hosted (e.g., SaaS) solutions will be considered.

Sacramento City Unified School District is seeking a solution that supports and conforms to best practices for substitute placement in K-12 educational environments of comparable size, complexity and composition. A key objective is to maximize efficiency in the placement of qualified substitutes in openings, and ensure that substitute usage correlates precisely with actual needs based on recorded absences. This will enable effective utilization of staff and reduce overall operational costs.

Interested firms are asked to submit a recommended implementation plan and to clearly specify the areas where services will be provided, a proposed staffing plan indicating the quantity and types of software and human resources that will be provided/leveraged, standard time unit rates for professional services based on role, a project schedule enumerating key implementation milestones and deliverables, and the roles and responsibilities of the District project team in the implementation process. Implementation plans should include, but are not limited to:

- Software installation and configuration;
- Applicable network and hardware requirements;
- Technical architecture and proposed/available integration models (articulation of APIs, Web Services, etc.);
- ERP Integration;
- Security architecture;
- Data model;
- Data conversions

The District is interested in recommendations on how to implement best practices to ensure project success, knowledge transfer and positive system acceptance, while keeping project costs at reasonable levels.

To control the cost of the system, the District will make every reasonable attempt to use the software as proposed without modification. However, the proposal must also contain an estimated configuration and/or modification cost based on experience with other customers to effectively achieve the necessary District requirements, including rates and timeframes for development work as well as articulation of support and maintenance impacts. The requirements contained in this RFP represent the District's vision of how substitute placement will work. As such, we realize that the requirements may exceed the offerings currently available in the marketplace. For this reason proposals will be evaluated in their entirety with attention to immediate functionality as well as flexibility to accommodate changing requirements and technology.

Proposals should clearly delineate how the software system can best satisfy the stated requirements of the District and how the implementation approach will minimize the risk of delayed implementation.

The District expects to consider only proposals demonstrating forward-thinking systems which will sustain the District well into the future. The application system is required to be an existing software system incorporating the operational functions described in this RFP.

#### A. Background

Established in 1854, Sacramento City Unified School District is one of the oldest K-12 school districts in the western United States. SCUSD serves 43,175 students on 75 campuses spanning 76 square miles; SCUSD employs 4,213 people and operates with a budget of \$383 million.

SCUSD is home to a 2013 California Distinguished School (West Campus High School), the only public Waldorf-inspired high school in the region (George Washington Carver) and the only Hmong language immersion program in the state (Susan B. Anthony Elementary School). In 2015, Sam Brannan Middle School was awarded a Gold Ribbon Award from the California Department of Education for their model program which includes standards-based activities, projects, strategies, and activities.

Our Board-adopted mission statement promises the community that our students will "graduate as globally competitive life-long learners, prepared to succeed in a career and higher education institution of their choice to secure gainful employment and contribute to society."

SCUSD's students reflect the rich diversity that is the hallmark of Sacramento's central city. Our student population is 37.1% Hispanic or Latino; 17.4% Asian; 17.7% African American; and 18.8% white. About 5.3% of students are of two or more races or ethnicities. Residents within SCUSD speak more than 40 languages; 38% of students do not speak English at home.

Providing the highest quality of education to our students is our everyday goal. Having reliable, fully qualified professional substitutes in our schools is a high priority to support student achievement. The role and responsibility of a substitute is a vital one as a qualified substitute ensures the instructional process will proceed in a near to normal fashion.

SCUSD currently utilizes SubFinder, an automated "sub-calling" system that allows the school district to log teacher absences and schedule substitute teachers. Since SubFinder has been purchased by Frontline Technologies, and an announcement has been made regarding the pending retirement of the SubFinder system, the District has decided to evaluate all comparable systems in the marketplace.

## **B. Current Infrastructure**

A successful software application from a qualified Proposer shall integrate with SCUSD's single LDAP authority Microsoft Active Directory and role based authentication or support a single sign-on (SSO) methodology. It is also anticipated the system will be integrated with the District's ERP and SIS application systems.

## **II. GENERAL INSTRUCTIONS**

Interested firms are invited to submit one original plus three (3) hard copies, and one (1) electronic copy of the RFP on a portable "thumb-drive" in write protected PDF format.

The complete response, together with any and all additional materials, shall be enclosed in a sealed envelope addressed and delivered no later than 4:30 p.m. on Tuesday, September 8, 2015 to the following address:

Sacramento City Unified School District  
Contracts Office  
5735 47th Avenue  
Sacramento, CA 95824

The sealed envelope shall be marked on the outside lower left corner with the words "RFP for Integrated Substitute Management Software." It is the firm's sole responsibility to ensure their response is received prior to the scheduled closing time for receipt of Proposals. No corrected or resubmitted Proposals will be accepted after the deadline. Faxed responses are not appropriate for submission and will neither be accepted nor considered.

This Request for Proposals does not commit Sacramento City Unified School District to award a contract or pay any costs incurred in the preparation of a response to this request. The District reserves the right to accept all or part of any responses or to cancel in part or in its entirety this Request for Proposals. The District further reserves the right to accept the response that it considers to be in the best interest of the District.

All requirements must be addressed in your proposal. Non-responsive proposals will not be considered. All responses, whether selected or rejected, shall become the property of the District. Firms are responsible for checking the District website periodically for any updates or revisions to the RFP.

The District will consider and evaluate proposals from any firm that can provide both the software and services requested as well as those who have partnerships as Joint Ventures for this project. Should firms decide to submit proposals under a Joint Venture partnership, the proposal shall clearly define which firm shall be the lead or prime firm in the proposal. Should a contract be awarded, it will be done through the

firm which is identified as the lead or prime. All other firms shall be considered as subcontractors through the lead/prime firm. The submission must be for all components of the RFP. In the event a proposal contains only a portion of the requirements, the submission will be deemed non-responsive.

## **Requests for Information**

Questions related to this RFP should be submitted in writing to [kimt@scusd.edu](mailto:kimt@scusd.edu) no later than Friday, August 28, 2015. Specify “RFP for Integrated Substitute Management Software” in the subject line. Responses to all questions received will be posted on the District website, [www.scusd.edu](http://www.scusd.edu), Contracts Office page.

All contact regarding this Request for Proposals during the submittal preparation and evaluation period must be done in writing through the Sacramento City Unified School District Contracts Office.

In the event a firm has contact with any official, employee or representative of the District in any manner contrary to the above requirements, said firm may be disqualified from further consideration.

## **Submission Format**

The proposal must, at minimum, address all mandatory and desired services, equipment, material, etc. Responses will fully describe how the services will be performed and any other information helpful in the decision making process.

### **III. SCOPE OF SERVICES**

The District is seeking comprehensive Integrated Substitute Management Software that can meet its current and future information system needs and service requirements.

Set-up, maintenance, and reporting are required for each functional area. Live data from all functional areas should be available to anyone authorized access by the District. The following is a detailed scope by each functional area:

#### **1) General Features**

The proposed software must be an established, robust substitute management application which is currently used by many in the K-12 marketplace for managing the complex tasks of absence tracking, substitute scheduling, booking, and compensation such as those described in this RFP.

- a. System is browser-based and web-hosted. System must be securely accessible via any reasonably current standard web browser (Chrome, Firefox, Safari, and Internet Explorer). Also accessible via telephone and/or smart phone app.
- b. User logins must be authenticated via Active Directory. Application security must utilize AD.
- c. Substitute operator should be able to set days substitutes are available to work, sites they prefer to work at, and areas of expertise.

- d. Teachers can optionally identify substitutes they prefer and optionally exclude substitutes from being selected for their classroom.
- e. Building Administrators can optionally set preferences for substitutes selected for their school; they can exclude those they don't want as well. They can override teacher preference.
- f. System Administrators have the ability to give priority to one class of substitutes over another.
- g. System automatically matches substitutes to positions (or excludes them) based upon various parameters including, but not limited to:
  - i. Individual qualifications
  - ii. Priority assigned to an individual substitute
  - iii. Seniority
  - iv. Length of time since last assignment
  - v. Negative evaluations
- h. System must have a means to determine substitute compensation based upon any combination of factors including, but not limited to:
  - i. Absent employee placement on the salary schedule
  - ii. A salary schedule
  - iii. Number of days in a position
  - iv. Total days subbed in a year
  - v. Number of hours subbed in a day
- i. Automatically match substitutes based upon skillset; configurable to not allow for manual override by site/department to select a substitute of their choosing.
- j. System should allow for prearranged substitutes.
- k. Employees must access the system to schedule their absence(s).
- l. Administrators have the option of requiring administrative approval for an absence before a substitute is scheduled.
- m. Administrators have the option of being notified when an employee posts an absence and when a substitute confirms acceptance of placement in the position.
- n. System permits Administrators to enter absences on behalf of absent employees if the person is unable to do so themselves.
- o. Substitutes can set their preferred method of contact including email, telephone, text message, or smart phone alert.
- p. Substitutes can set "Do Not Disturb", "Temporarily Unavailable" or similar statuses.

- q. Ability to attach budget codes to substitute expenses based upon any combination of:
  - i. Site worked at
  - ii. Reason for absence
  - iii. Teacher budget code
- r. System allows absent teachers to share dated notes, files and documents with substitute(s).
- s. System allows school administrators to run pre-built reports on a variety of information including attendance records for substitutes and staff.
- t. System is tightly integrated with, and can import all necessary data for employees and substitutes from our ERP (currently ESCAPE, moving to Workday effective 1/1/2016).
- u. System is tightly integrated with, and can export time records (both employee and substitute), absence/assignment information and earnings detail to our ERP and in commonly used formats such as .csv or Microsoft Excel.
- v. System has calendar functions to:
  - i. Define days for which substitutes are not required and days for which no absences should be reported
  - ii. Define A/B employee work schedules
  - iii. Define multi-site employee work schedules
- w. System is highly-reliable, fault-tolerant.
- x. System has independent certification of security; uses secure connections.
- y. System is scalable in such a manner to handle increased demand or spikes in usage should they occur.

## **2) Calling Features**

- a. Automatically call/notify selected substitutes, offer jobs, document responses (including declines).
- b. Optionally send email, smart phone app notification or text message in the following scenarios:
  - i. Reminder to substitutes for jobs that they have accepted
  - ii. Sending daily absence summaries to building administrators
  - iii. Confirmation of acceptance of an absence
- c. Proposer must demonstrate that the system has more than sufficient telephone lines to handle a call maximum volume of 400 absences per day. System must be able to place long distance calls as well as local calls.
- d. The system must provide the ability to set up calling methods, times, and dates as well as restrict calling on holidays and non-work days.
- e. System should be capable of generating automatic emails of absence and assignment activity.

### **3) Reporting Capabilities**

- a. Reports of activity including but not limited to:
  - i. Absences by leave category
  - ii. Absences by day of the week
  - iii. Absences by specific date range
  - iv. Absences by location
  - v. Absences by employee
  - vi. Absences by job code
  - vii. Absences by union
  - viii. Absences by classification
- b. Data extracts/Custom reports:
  - i. Custom report writer/data extract utility should be available
  - ii. System should provide a means by which the District can create a custom extract without the need for the Proposer to create it
  - iii. Extracts can be in different formats including but not limited to: fixed length text, delimited text, HTML, CSV
  - iv. Exports to Excel for analysis
- c. Provide absence reason balance reports that can be filtered or sorted by school/location/job/union etc.
- d. System must assist the District with complying with the Affordable Care Act by reporting substitutes who work near or above the benefits eligibility threshold and to enforce limits such that substitutes do not unintentionally become benefits eligible.
- e. Status reports containing information about absences at a particular location, on specific days or a date range, by identified individuals, and/or the substitute assigned to fill the vacancy.
- f. Report access should be controlled by security within the system with varying levels of access granted to secretaries, building administrators, and/or central office staff. This access should be configurable by the District.
- g. Reports should be generated at any time without interruption of other operations and system functions.
- h. There should be an ability to schedule reports to run at predetermined times and on predetermined schedules.

### **4) Data Capabilities**

- a. Data will be imported from our ERP including, but not limited to: demographic data, position data for one or more positions, accounting information, pay rates.
- b. System must record absences by days, half days, or hours.
- c. Substitutes shall be able to define specific requirements such as the sites they will work at, their availability, preferred method of contact, phone number, and email address.

- d. System must provide a detailed audit trail.
- e. Retain and maintain multi-year historical data including:
  - i. Substitute assignments
  - ii. Absent employee reason for absence
  - iii. Record of substitutes response to job offers

## 5) **System Reliability/Integrity/Security Features**

- a. System must have adequate backup procedures to safeguard against system malfunction such as:
  - i. Use of virtualization technologies to provide failover in the event of a hardware malfunction
  - ii. Multiple operational sites to mirror primary site with failover in the event the primary site is non-functional
  - iii. Backup power that can support the system continuously for a minimum of seven consecutive days
  - iv. Redundant network and telephone access
- b. System administrators shall have the ability to create and maintain a custom security profile to govern access to various components of the system.
- c. Secure access via the Internet will be only using 128-bit SSL and Active Directory authentication.
- d. Telephone and/or smart phone access will require a secure PIN.
- e. If a hosted SaaS solution, Proposer must demonstrate ability to conform to all security, privacy and regulatory requirements governing K-12 data.

## 6) **User Interface**

- a. User interface should be extremely simple requiring minimal, if any, end-user training.
- b. All available jobs will be posted simultaneously on the web and the telephone for substitutes to access and accept as long as they meet the qualifications of the job offered. e.g. The system shall provide simultaneous access to individual job postings via telephone and the internet. For example, if the system is making outbound calls to find a substitute to fill a job, another substitute should be able to see and accept the same job on-line during the automated outbound calling process as long as the job has not been already accepted.
- c. Substitutes must have the ability to actively seek jobs as well as receive calls for jobs.
- d. The substitute must be allowed to accept or reject the job. If the job is rejected the substitute must indicate why.
- e. Provide the teacher a means by which to leave notes, a lesson plan, and other materials such as pdfs, PowerPoint documents or information for the substitute.

- f. Provide a means by which a substitute can specify date and/or time ranges when they will not be available for a job.
- g. Provide a means by which to post general purpose notifications or announcements.

**7) Customer Support/Training/Updates**

- a. For SaaS solutions, systems updates (hardware and software) are the responsibility of the firm and must be scheduled and deployed in a manner consistent with best practices.
- b. System updates, patches, enhancements and bug fixes are to be scheduled, tested, validated and communicated in a timely and transparent manner consistent with industry standard best practices.
- c. Training and/or training resources are to be provided for each group involved with the system (school administrators, substitutes, teachers, staff, system administrators).
- d. Training materials such as 24x7 access to online training resources—video vignettes, pre-recorded webinars, documentation, FAQs, etc. are expected.
- e. Emergency support for system down, report malfunctions etc., is required.
- f. Telephone support
- g. Online training
- h. Annually, at a minimum, on-site meetings to plan for upcoming features, etc.
- i. Live tech support in addition to telephone and email support.

**8) Project Implementation Plan and Post Go-Live Support**

- a. Project plan must be presented
- b. Implementation planning must be conducted with District staff and/or consulting team
- c. Detailed documentation for integration with ESCAPE and then with Workday
- d. Dedicated support staff assigned to SCUSD
- e. Detailed training and training documentation
- f. Direct support during post implementation – 3 months, 6 months, 12 months after user acceptance

## **IV. PROPOSAL CONTENTS**

Each proposal shall include a description of the type, technical experience, background, qualifications and expertise of the firm as described in this RFP including, but not limited to, the Scope of Services included. The description shall show that the firm possesses the demonstrated skills and professional experience to perform the general functions requested and fulfill the goals and vision of District. Proposals shall contain the following:

### **A. Executive Summary**

Provide an overview of the entire solution describing the general approach or methodology the firm will use to meet the goals and fulfill the general functions as set forth in this RFP.

### **B. Table of Contents**

### **C. Identification of the Proposer**

Please provide full identification and company contact information to include:

- a. Legal name and address of the company.
- b. Legal form of the company (corporation, partnership, etc.).
- c. Subsidiaries and affiliations.
- d. Address and phone number of the office that will be primarily responsible for providing services for this Proposal.
- e. Business License Number(s)/Classification(s).
- f. Contact name, title, email address and phone number.

### **D. Staffing Resources**

Please describe the staffing resources of the firm and those that will be assigned to this project.

- a. Provide total number of professional staff employed by the firm.
- b. Identify three (3) persons that will be principally responsible for working with the District. Indicate the role and responsibility of each individual. If the firm is chosen as a finalist, these principal individuals must attend the interview in person.
- c. Provide brief biographies of individuals that will be working directly with District.

### **E. Fiscal Stability/Insurance/Legal**

1) Provide evidence of corporate stability including:

- a. A letter from a financial institution stating a current line of credit.
- b. A Certificate of Insurance showing evidence of general liability insurance coverage.

2) Provide sample documents including

- a. Software License Agreement: Provide a copy of your proposed software license agreement. Software licensing agreements are subject to the District's legal review, approval, and amendment. Indicate if your software licensing agreement is for an unlimited number of users, or if the cost varies based on the number of users, and if so, in what way. Identify any additional licensing that will be needed (MS windows clients, SQL, etc.)
- b. Sample contract agreement

## **F. Experience and Technical Competence**

### **1) Experience**

Please provide a description of how the firm's experience, technical and professional skills will meet the goals and fulfill the general functions identified in this RFP.

- a. State the number of years the firm has conducted business. Firm must have at least five (5) years of experience in providing the required scope of services for public clients, preferably California school districts.
- b. Describe any experience with providing services for California school districts. Include the name and description of the project.
- c. Explain your organization's experience in managing sub-proposers if sub-proposers are included in the solution.

### **2) Project Specific Experience:**

- a. Relevant Experience: Provide a description of the five (5) most relevant and comparable software/consulting services contracts held by the firm, preferably involving California K-12 educational entities to include:
  - i. Description of the role(s).
  - ii. Dollar value of the project.
  - iii. Dollar value of the fees received.
  - iv. Project description - Describe project information that explains in detail the scope of previous projects. Proposers should explain how the implementation scope was effectively achieved in terms of level of difficulty and functional structure as it pertains to the scope area of this RFP.
  - v. Staffing
  - vi. Duration of the project.
  - vii. Demonstration of staffing tasks being efficiently completed on time and within the allocated budget.

### **3) If any of the following has occurred, please describe in detail**

- a. Failure to enter into a contract or professional services agreement once selected.
- b. Withdrawal of a proposal.
- c. Termination or failure to complete a contract.
- d. Debarment by any school district, municipal, county, state, federal, or local agency.
- e. Involvement in litigation, arbitration, or mediation. Provide litigation history for any claims filed by your firm or against your firm related to the intended scope of work as it relates to the RFP in the last five (5) years.
- f. Conviction of the firm or its principals for violating a state or federal antitrust law by bid or proposal rigging, collusion, or restrictive competition between bidders or proposers, or conviction of violating any other federal or state law related to bidding or professional services performance.

- g. Knowing concealment of any deficiency in the performance of a prior contract.
- h. Falsification of information or submission of deceptive or fraudulent statements in connection with a contract.
- i. Willful disregard for applicable rules, laws or regulations.

4) Technical Competence

- a. Description of in-house resources (i.e., technical skills, project management, communication, network infrastructure, contracts, database management, programmers, software application, system administration, training professionals, etc.).
- b. Ability to draw upon multi-disciplinary staff to address the services requested in this RFP.

5) Customer References

- a. Include customer references for five (5) current like-sized school district customers including customer name, scope of project, contact name, contact address, contact phone number, and contact email address.

**G. Sub-Proposer Requirements**

Any sub-proposers performing services against this agreement must be fully listed and detailed in the proposal submitted. State a complete description of any work proposed to be provided by any sub-propose, and provide evidence of each sub-propose's capability and willingness to carry out the work. For each proposed sub-propose, include firm name and address, and management contact person. Include descriptive information concerning sub-propose's organization and abilities include evidence of all proposed sub-proposes' valid permits and licenses. Include a minimum of three (3) customer references including contact names, address, phone numbers, e-mail, and other contact information for each reference, for similar type of work that each sub-propose has performed within the last five (5) years (public education in particular). Include descriptive information concerning sub-propose's employees, in particular those that will be directly involved in providing services to the District.

**H. Proposed Software System**

Define the level of integration among these areas and provide examples of how the integration increases efficiency and improved levels of data integrity.

- 1) Provide the name of the system application you are proposing, the version/release of software and the date when this version/release first became available, and address the following:
- a. Database(s) utilized
  - b. Support for Browsers
  - c. Features/Subsystems (components of Fully Integrated System)
  - d. Describe the standard features for each subsystem

- 2) Identify other subsystems offered by your company that are integrated with the proposed system. State whether these are standard features of the proposed software or are optional modules.
  - a. What are the effects from adding optional systems as specified on any aspect of operations?
  - b. Address any and all issues applicable to adding these optional systems that the District needs to be aware of at this time.
- 3) Address all items described in Section III, Scope of Services.
- 4) Third party: Indicate any third-party application “plug-ins” that are required to deliver the capabilities your organization proposes to provide; provide specific information. Advise additional licensing that may be required.
- 5) Customization
  - a. Indicate what customization of your software will need to occur in order to meet our requirements. Estimate the number of hours for each and advise as to all factors that will affect customization. The District reserves the right to obtain customization from the software proposer, the company that performs the (separate) implementation/integration, or use in-house resources.
  - b. Identify the programming tools used to customize the software.
  - c. Describe how customized features are re-applied after upgrades.
- 6) Import/Export Tools
  - a. Describe the tools available and the methods employed to extract data.
  - b. Describe the standard formats that are used.
  - c. Describe the tools available and the methods employed to load data from other sources into the database tables.
- 7) Database Design
  - a. Table design – Describe the table formats and database methodologies of the proposed system.
  - b. Integrity checks – Describe the checks used in the proposed system which ensure integrity within/between the tables that make up the database(s).
  - c. Describe the data dictionary and their definitions.
- 8) Facilities for off-loading and retrieving historical data
  - a. Describe the facilities used to off-load data from the standard database for storing in an archival repository.
  - b. Within the facility, describe the criteria that can be used to select records for removal and storage. For example, “Remove all inactive employee records and send them to the archival repository.”

- c. Describe the facility to make use of data in the archival repository.
- 9) Documentation: Describe availability of the following documentation:
  - a. User reference manuals, installation manuals, system administrator manuals, training materials (guides, handouts, quick reference materials)
  - b. Installation manual
  - c. Systems Administrators manuals
  - d. Training materials (guides, handouts, quick reference materials).
- 10) Explain how changes, updates, or upgrades to the proposed system are made available.
- 11) Describe the techniques used in the development of the proposed system that makes problems/bugs easier to locate and fix.
- 12) Recoverability
  - a. Describe the recovery features that are built into the system.
  - b. For a vendor-hosted system, describe the backup and restore procedures and frequency that are included in the proposal.
  - c. Describe the techniques used to ensure the integrity and recoverability of the database following a software or hardware failure.
- 13) Security
  - a. Describe the features of the system that are designed to prevent unauthorized or inadvertent access to data, programs or screens. Include any other security features.
  - b. Describe your systems' methods of authentication for transactions that require approval.
  - c. Describe your systems auditability and the method of tracking transactions and changes to data.
- 14) Provide a list of the standard reports and samples of those reports that can be produced. Reports must be available both on line and printed.
- 15) Ad Hoc Reporting: Provide a description of your ad hoc reporting product and its capabilities. If data must be exported and imported to another system, describe the process for doing so.
- 16) Data Validation and Editing Criteria
  - a. Describe the data validation elements.
  - b. Describe the edit check functionality and content structure.
  - c. How are the error messages referenced and explained?

- 17) Management Software
- Identify the systems/applications management software that will be used to support implementation and operation of the proposed system.
  - Identify the network management software that will be used to support implementation and operation of the proposed system.
- 18) System Integration
- Describe the degree of integration with the various components/subsystems of the proposed system.
  - Describe the methods provided in the proposed system for navigating from screen to screen or function to function.
  - If essential data carried forward to the new screen/function? Does data have to be moved between the systems modules? If so, how?
- 19) Performance
- Describe in detail any limitations in the operation of this system that would limit the number of concurrent users.
  - Does the operation of any subsystem adversely affect the operational performance of any other subsystem? If so, in what way and under what conditions?
  - Are there any required processes that preclude the full and complete operation of the proposed system? If so, please specify how and when these processes are performed and what their impact is.
  - Data volumes: What are the ranges of data volumes your system(s) can support? Provide specifics considering the size and requirements of the District.
- 20) Response times: Give response times for the following areas:
- Screen to screen within the same module.
  - Switching time between modules.
  - Log-in time
  - Generating the average report.
  - Describe limitations regarding concurrent users.
- 21) If you have a workflow system, which email protocols and client software do you support? What open standards do you support for email?
- 22) If you provide any electronic document management systems, please answer for each system/application:
- Identify the application
  - Is it a third party system? If so, who is the system provider?

- c. What are the hardware and software requirements?
- 23) Provide pertinent information regarding your software's compatibility with other software systems.
- 24) Future developments: Detail initiatives within the application environment that would be of benefit in relation to your proposed system. Detail any planned changes that will enhance the performance and longevity of the proposed system.

## **I. Technical Environment**

- 1) Preferred Configuration
  - a. Identify server(s) needed, telephone capacity, and associated hardware requirements.
- 2) Browser Compatible Environments including: Internet Explorer, Firefox, Chrome, and Safari.
- 3) Web Services Integration – Describe your philosophy and tools available for integrating and building interfaces for external applications.

## **J. Proposed Method to Accomplish the Work– Implementation Plan**

Describe the technical and management approach to the proposed partnership with the District necessary to accomplish the scope of the project goals of District, and general functions required as set forth in this RFP. In reviewing the Scope of Services, the firm may identify additional necessary tasks, and is invited to bring these to the District's attention within the discussion of its proposed method to accomplish the work.

- 1) Implementation Information: Based on the proposed system, estimate (and explain the basis for your estimate) the following for a district of our size and complexity:
  - a. Overall Implementation Plan: Firms should present a recommended method with considerations for the following:
    - i. Design and configuration
    - ii. Testing
    - iii. Training
    - iv. Import/input of data accumulated
  - b. Manpower requirements: District and Firm/Consultants – Estimate what District and Firm resources will be needed to perform each aspect of the Implementation Plan.
  - c. Provide a strategy and brief explanation of your data conversion processes.

## **K. Recommended Training Plan**

District understands that training is key to a successful project. The Proposer should also present a recommended training plan that will be needed throughout the implementation. The training approach should begin with the software installation and continue through the end-user training and post go-live

training as needed; as well as continuous training offerings by the Proposer, or other recommendations. Proposers are encouraged to expand on the types of trainings available for their recommended system.

- 1) Describe the training strategy normally provided to new clients. Include what subject area and the duration of each training session. Describe how the training will be delivered, i.e. classroom, webinar, etc. Identify the preferred number of attendees typically in each target audience. What is the maximum number of users that can be trained in one session? What additional training is available? What additional training do you recommend above that normally provided?

## **L. Configuration and Equipment Recommendation**

Based on District's configuration, identify the equipment required to support the proposed system, if any. The firm may present a price for providing the necessary equipment to effectively operate the recommended software system. However, the main purpose of the RFP is for the business system software and not necessarily the equipment.

- 1) Specify the type and number of web servers, application servers, database servers, printers, storage devices, firewalls, etc.
- 2) List the peripheral devices that enhance the system, i.e. scanners, communication devices, electronic card readers, digital photos, bar code readers, OCR readers, etc.
- 3) Delineate devices that must be acquired as part of the proposed system and those devices that can be purchased separately through other vendors.
- 4) Provide a list of all configuration options for operating the proposed application software. This configuration list must include all operating, network and database systems. Additionally, the firm will provide a recommendation as to the optimum configuration with their software.
- 5) Hosted system – Provide a configuration and pricing option for an exclusively vendor-hosted environment and/or a co-hosted environment with aspects of the system hosted by the Proposer and partially by District. The hosted and co-hosted configurations must specify the hardware, operation and database management systems, network platform, and connectivity, including the costs to have systems hosted by the Proposer. Specify the availability of District end-users and technical staff to access the hosted application. Also, state the associated support commitments by the Proposer. The proposal should include a breakdown of these costs.

## **M. Recommended District Staffing Levels**

The District employs various technical staff to support the Information Systems and technology infrastructure of the District. Please complete the following tables with the firm's recommended technical staffing levels and associated skill set that District should expect to employ in order to satisfactorily support the system. The District staff levels should be broken down for the following: Implementation Phase, Post-Implementation Phase, and on-going Maintenance and Support. For each of these phases provide the roles, number of positions, and skill set required in each area for proposed system.

Implementation Phase				
Role	# of FTE's	Skills	Responsibilities	% of Time
Post Implementation Phase				
Role	# of FTE's	Skills	Responsibilities	% of Time
On-going Maintenance and Support				
Role	# of FTE's	Skills	Responsibilities	% of Time

## N. Ongoing Support and Maintenance

- 1) Ongoing Support: Describe how ongoing technical support will be provided:
  - a. Provide cost information for supporting the software.
  - b. Identify hours of availability of the technical support help desk.
  - c. Identify methods available to contact technical support help desk.
- 2) Software Maintenance: Describe how new software releases, system upgrades, and bug fixes are released, distributed and installed.
  - a. What is the frequency of software update releases, and how many new releases have there been in the past five years?
  - b. What is the impact on the users, technical support personnel, and the database?
  - c. Upgrades of the system and application product should not affect in- house tailoring, should be transparent to the user and automated— address this issue in detail.

## O. Cost

Costs should include the complete costs for the system including software, license fees, design & configuration, training, travel, per diem, installation, documentation, discounts, support, operating costs, etc. For each item, indicate if the cost is one-time, annual, or other. In the event the product or service is provided at no additional cost, the item should be noted as “included”. In the event, the proposal is being submitted including more than one vendor, the form should incorporate all the costs associated with the proposal under the lead proposer’s name.

## V. EVALUATION CRITERIA AND PROCEDURES

### Stage One

Proposals will be subjected to a two-stage evaluation and selection process. The first stage will begin with a review of the responses to the proposal by a Selection Advisory Committee. A proposal must address all requirements outlined in the RFP to be considered. Evaluation criteria will include:

- Responsiveness to the proposal specifications and detailed submittal requirements. Proposals found to be incomplete may be rejected as non- responsive. Proposals not deemed to be competitive may also be rejected.
- Previous successful installation of proposed software in school districts within the state of California is preferred. However successful installations of proposed software outside the state of California are also deemed appropriate for evaluation.
- Proposal must be a comprehensive management information software application that includes the functionality identified in the Scope of Services.
- Overall functionality of the software system
- Cost of software and implementation services
- Maintenance and support costs
- Proposer experience with similar implementations
- Implementation methodology plan/staffing
- Reference checks

Each submittal will be scored by an evaluation committee comprised of individuals from inside and outside the District. A short list of proposals will move into the second stage of the evaluation.

## **Stage Two**

The finalist proposals will be subjected to a more detailed second stage evaluation that will include demonstrations involving use of actual data on live systems. The District may elect to provide the demonstration data or may elect to have the firm provide data that closely matches a K-12 district similar to Sacramento City Unified School District. In addition to demonstrating functionality and business processes performed using the system, the firm will be required to describe and demonstrate their technology and proposed hardware/software deployment strategy.

This is a negotiated procurement and, as such, the contract will not necessarily be awarded to the firm submitting the lowest priced proposal. Award will be made to the firm submitting the best responsive proposal satisfying the District's requirements, price, and other factors considered. As with any service acquisition, cost is a major consideration. It is vitally important that the district gets value for its investment and is able to demonstrate this to its constituency.

SCUSD reserves the right to conduct negotiations or to award a contract without negotiations. Terms, conditions, prices, methodology, or other features of the firm's response may be subject to negotiation and subsequent revision. As part of the negotiations, the firm may be required to submit supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the response.

The names of all firms submitting proposals and the names, if any, selected for interview shall be public information. At the conclusion of the RFP process, committee comments and evaluation scores, as well as contents of all proposals become public information. Firms that have not been selected will be notified in writing after the conclusion of the selection process.