



REQUEST FOR PROPOSALS

For

PURCHASE, INSTALLATION AND MAINTENANCE OF A STUDENT INFORMATION SYSTEM

Request for Proposals Issued: May 3, 2013

Deadline for Submittal of Proposals: June 7, 2013

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Attachments:

1. Application Requirements Checklist
2. Vendor Qualifications Questionnaire
3. Implementation Services and Project Plan Questionnaire
4. Software Costs (Cost Sheets: Table 1 – 5)
5. Implementation Services Costs (Cost Sheets: Table A – E)
6. Technology Requirement Questions
7. Sample Documents

Request for Proposals for Student Information System

I. OVERVIEW

Introduction

The Sacramento City Unified School District (SCUSD) is requesting proposals from qualified software firms to provide a comprehensive, fully integrated, operational Student Information System (SIS) that will meet the information needs over the next ten years. SCUSD is seeking an interested company that can provide solutions to address current and future SIS needs. SCUSD is exploring innovative alternatives to its existing SIS. The successful firm shall meet the terms and conditions set forth in this document and all attachments. Note: Individual and separate proposals will be accepted from implementation partners for the same vendor.

Project Background/Description/Objectives

The Sacramento City Unified School District serves over 42,000 students in 77 schools, pre-K through adult. SCUSD is one of the most integrated and diverse urban education systems in the country. This diversity, along with a reputation as a district focused on continuous improvement, and its location in the capital city of a global economy draws close observation from educators and the media.

The current SIS provides solid core functionality and reporting and has been modified extensively throughout the years to keep up with the changing climate of education. SCUSD expects to consider only providers that demonstrate forward-thinking solutions that will sustain the district well into the future.

The SIS must provide functionality to support classroom, school, community, administration and student records administrative functions appropriate for a K-12 school district. The application system is required to be an existing, integrated software system that incorporates the operational functions described in this RFP.

Vendors are asked to submit a recommended implementation plan and specify the areas where services will be provided as well as clearly specifying the responsibility areas of the SCUSD project team. Implementation plans may include but are not limited to; software installation and configuration, data conversions, interface development, training and implementation support and management. The SCUSD is interested in vendor recommendations on how best to ensure project success, knowledge transfer and positive system acceptance, while keeping project costs at reasonable levels. Keeping implementation costs to appropriate levels is of considerable importance to the SCUSD.

To control the cost of the system, the SCUSD will make every reasonable attempt to use the software as proposed without modification. However, the proposal must contain an estimated modification cost based on experience with other customers. The requirements contained in this RFP represent the SCUSD's vision of an integrated system. 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 SCUSD and how the implementation approach will minimize the risk of delayed implementation. The SCUSD expects the proposals to include recommendations for hardware to satisfy stated performance requirements. However, the SCUSD may choose to acquire hardware through a separate process.

The SCUSD's objectives are to increase productivity and maintain accuracy and consistency with a greater emphasis on monitoring, analyzing and reporting of student information by:

- Ensuring accurate reporting to the California Department of Education, through the California Longitudinal Pupil Achievement Data System (CALPADS). CALPADS is a longitudinal data system used to maintain individual-level data including student demographics, course data, discipline, assessments, staff assignments, and other data for state and federal reporting. Demonstrated success of this requirement must be shown.
- Utilizing state-of-the-art technology involving data communications and computer hardware and software.
- Utilizing software that is fully integrated, and has the ability to expand in the future.
- Utilizing software that has an in-depth reporting capability for both "canned" and ad hoc reporting.
- Reducing the amount of manual and repetitive data entry.
- Achieving faster entry of data, quick access to information and online reporting capabilities.
- Producing timely reports including ad hoc reports without the need for extensive report generation training, or continual internal support or vendor support.
- Utilizing software that is functional for use by the central office and all non-central administrative and program entities.
- Contracting for the services of providing the software and all necessary consulting support to install, test, train and implement the new system.

SCUSD desires to begin implementation and staff training during Summer 2013 and plans to go live with a new Student Information System district-wide by February 2014, but welcomes recommendations for proven and successful implementation calendar.

II. GENERAL INSTRUCTIONS

Interested firms are invited to submit one original binder, seven (7) hard copies, and seven (7) electronic copies of the RFP on a portable "thumb-drive" in write protected PDF format containing all documents. Note: The requirements responses (Excel spreadsheet) must remain in Excel format for upload to our analysis software.

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 Friday, June 7, 2013 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 Student Information System”. It is the firm’s sole responsibility to ensure that 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 not be accepted or considered.

This Request for Proposal does not commit the 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 website periodically for any updates or revisions to the RFP.

Requests for Information

Questions related to this RFP should be submitted in writing to sisrfp@scusd.edu no later than Friday, May 17, 2013. Specify “RFP for Student Information System” in the subject line. Responses to all questions received will be posted on the Districts website, www.scusd.edu, Contracts Office page.

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

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

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 that would be helpful in the decision making process.

The following table describes the required format and content for the vendor proposal. Proposals **must** contain all sections described below (except Section #8 for optional supplemental material), in the order shown. **Failure to adhere to this outline and properly complete all required proposal sections may result in the proposal being deemed non-responsive which will eliminate the proposal from further consideration.**

Proposal Section <i>Each section to be marked by a <u>tabbed divider</u></i>	Section Contents <i>Each section to be marked by a <u>tabbed divider</u></i>
1. Transmittal Letter	This letter is limited to one page.
2. Application Requirements Checklist	Completed Application Functional Requirements Checklist. See Attachment #1.
3. Vendor Qualifications Questionnaire	Completed Vendor Qualifications Questionnaire. See Attachment #2.
4. Implementation Services and Project Plan Questionnaire	One completed Services and Project Plan questionnaire. See Attachment #3.
5. Software Costs	Completed Software Costs Worksheets Tables 1-5. See Attachment #4.
6. Implementation Services Costs	Completed Services Costs Worksheets Tables A-D. See Attachment #5.
7. Technical Requirement	Completed Technical Requirement Questions. See Attachment #6.
8. Supplemental Material	Up to 20 pages of supplemental material may optionally be provided in this section.
9. Sample Documents	Provide any forms or documents used or produced by SIS. See Attachment #7.

III. SCOPE OF WORK

The requested proposals are for a comprehensive, fully integrated, operational Student Information System (SIS) that will meet the information needs over the next ten years. SCUSD desires a single software system to handle core SIS processing, and to replace as many additional student-related systems as possible.

SIS Functionality

SCUSD seeks to license student management software with highly integrated functionality including, but not limited to, the following areas:

- Address Specifications
- System Administration, Design, Operations
- Tiered Administration and Security
- Assessments
- Attendance
- Communications
- Contacts
- Discipline
- Enrollment (Regular and extended)
- Faculty
- Grade Reporting
- Health
- Master Scheduling

- Other System/Application/ Export File Integration
- Parent Portal
- CALPADS and California State/ Federal/ Grant Reporting
- Program History
- Query/ Report Tool
- Special Education
- Student Accountability
- Student Data
- Student Scheduling
- Support & Training
- Transcripts & Graduation Requirements
- Transfers

Services

SCUSD seeks to procure the following services as part of this project:

- Data conversion and migration from existing district systems
- Development and replacement of in-bound and out-bound interfaces
- Implementation services, including system configuration
- Integration services
- Change management, including process re-engineering
- Software maintenance and enhancement support
- System documentation
- Testing
- Training and user support

Requirements for the SIS Software

A complete listing of technical requirements and specifications can be found in the RFP spreadsheet located at [www.scusd.edu/Offices/Contracts/Request for Proposals/Student Information Services](http://www.scusd.edu/Offices/Contracts/Request%20for%20Proposals/Student%20Information%20Services). The completion of all sheets in this form is mandatory and it must be returned with your submission.

Project Deliverables

For purposes of this project, deliverables will be divided into three categories: Written Deliverables, Software Deliverables, and Non-Software Deliverables. Project deliverables, organized by category, are listed below:

Written Deliverables

- Project work plan (SCUSD and vendor staff)
- Project organization chart (SCUSD and vendor staff)
- Recommendations for SCUSD roles & responsibilities
- Recommendations for project structure and decision-making framework
- Project communication plan

- Project status reports
- Risk and issue management plan
- Architectural design, including an Entity Relationship Design (ERD)
- Software change control process
- Software configuration plan
- Software configuration/design documentation
- Systems interface plan and design/capability
- Detailed testing plan and test scripts
- Data conversion plan and design
- Knowledge transfer plan
- Deployment plan
- Comprehensive training plan, materials, and curriculum
- Complete system documentation
- “To Be” process maps illustrating how current daily processing will be completed in the SIS
- Complete end-user documentation, customized for SCUSD
- End-user support plan
- Technical support plan
- Application maintenance plan (including upgrades)
- List of minimum and maximum hardware requirements

Software Deliverables

- Baseline SIS software and licenses
- Fully configured SIS software with any customizations required to satisfy state, federal, or agreed-upon SCUSD requirements (“Configuration” is defined as any tasks, including system set-up, which can be accomplished without any programming changes. “Customization” is defined as any changes in programming required.)
- Upgrade SIS software and licenses
- Future configuration, customization, outputs, and/or reports required by any potential state or federal legislation
- Functioning of new and existing in-bound and out-bound interfaces
- Fully tested data conversion programs
- Provide recommended 3rd party software (any 3rd party software that cannot be provided due to licensing issues should be noted)

Non-Software Deliverables

- Conduct project kick-off meeting
- Provide dedicated project manager
- Provide implementation leadership and guidance to SCUSD project team
- Conduct unit and system testing
- Conduct integration testing
- Conduct volume/stress testing
- Support user acceptance testing

- Perform production tests
- Cutover to new software
- Conduct training
- Access to training and system administration material
- Conduct project close-out meeting

Project Location and Logistics

The project will be executed at the SCUSD administration building located in Sacramento, California. SCUSD will provide desks, chairs, and interoffice telephones. Vendor should provide estimate of the maximum number of workspaces required.

The vendor will be expected to provide the appropriate onsite resources at any given time during the implementation based on the current needs of the project. Building access, work hours, and any offsite work must be approved in advance by SCUSD. Members of the vendor's implementation team shall provide their own PCs. Project software standards include the standard Microsoft Office 2010 suite and Microsoft Project.

The vendor will designate a project manager who will be the primary point-of-contact with SCUSD during the implementation. The project manager will be responsible for all project activities performed by the vendor and the vendor's team. Although it is not necessary for the vendor project manager to be onsite during the implementation, he or she must be readily accessible via email or phone in order to provide adequate turnaround on SCUSD questions or requests.

The vendor project manager will also participate in SCUSD management team meetings as the vendor's point of authority for all issues related to the project.

SCUSD will also have a project manager for the duration of the project, and will provide a project team comprised of subject matter experts (SME's) who will be teamed up with a vendor consultant to:

- Define new process workflows
- Configure the software
- Perform unit, integration, and parallel testing
- Share knowledge
- Determine initial reporting requirements
- Execute data conversion and data migration activities to populate the new system.

The vendor project manager is expected to bring to SCUSD's attention any resource deficiencies.

IV. SPECIAL CONDITIONS

- The length of this contract shall be for the estimated implementation period plus ninety (90) days from date of award.
- Maintenance contracts are renewable annually for three additional years at SCUSD's discretion with contracted vendor's concurrence.
- Prices are to be held firm for at least the term of the contract, after which they may be renegotiated if the market dictates. Prices may also be renegotiated at contract renewal. Price

reductions are permissible at any time and any reductions passed on to other customers are to be correspondingly offered in the same ratio to the district. Vendor's failure to promptly notify SCUSD of such industry wide price decreases may constitute a breach of contract and the contract may be cancelled. SCUSD reserves the right to award any canceled contract to the next lower bidder or re-bid, whichever is in SCUSD's best interest. Invoices with price changes that did not receive prior approval from the Technology Services Department will not be honored.

- During the term of the contract, items considered to be essential to the functions of SCUSD not initially included in this proposal document, may be added by mutual agreement. SCUSD shall notify the successful vendor of any such items, and the specifications for such. The vendor will then have an opportunity to quote the product to SCUSD with pricing reflective of the current awarded contract terms. If accepted by SCUSD, the item will be added to the list of awarded contract items for the duration of the contract term.
- The Deviation Form is an integral and required part of the official proposal submitted. The Deviation Form must be completed and returned with the proposal even if no deviations are proposed. In the event that the vendor intends to deviate from the specifications by utilizing any materials or processes different from those listed, all such deviations are to be stated on the form.
- Deviations to any/all requested material in this proposal are subject to approval by the SCUSD prior to any resultant proposal award.
- SCUSD reserves the right to make multiple awards on this contract. (i.e., Primary awardee and secondary awardee(s).)
- Payment will be made upon receipt and acceptance by SCUSD of item(s) ordered, deliverables accepted, and receipt of a valid invoice. As required by law, the awarded vendor is required to pay subcontractors within ten (10) days from the receipt of this payment. Payment terms, unless negotiated with SCUSD, will remain the same.
- All invoices (in duplicate) will be sent to: Sacramento City Unified School District, Technology Services Department, Attn: Terry Kritsepis, Asst. Superintendent, 5735 47th Avenue, Sacramento, CA 95824
- Violation of any part of the Special Conditions listed may be cause for termination of the contract by SCUSD.

V. EVALUATION CRITERIA / SELECTION PROCESS

Stage One

Vendor proposals will be subjected to a two-stage evaluation and selection process. The first stage will begin with a review of the response to the proposal. A proposal must address all modules/functions to be considered.

1. The proposal will include SIS software and implementation services.
2. Proposals found to be incomplete may be rejected as non-responsive. Proposals not deemed to be competitive will be rejected.
3. The SCUSD may choose to ask clarification questions in writing and include the additional information gathered in this process. At the discretion of SCUSD, a vendor may be asked to do a

three hour demo of their student system at SCUSD as part of the Stage One evaluation. Any vendor that is unwilling or unable to do a demo may be deemed non-responsive and be disqualified.

4. References of the top vendors will be checked to verify their selection.

Evaluation and rating of the responses will be based on:

- Information provided by the vendor in their response
- Information provided by the vendor in response to SCUSD clarification questions
- Information from reference checks

Proposals that pass the initial screening will be evaluated and scored based on the vendors' response to the required attachments. Each submittal will be scored by an evaluation committee comprised of individuals from SCUSD and participating districts.

A short list of proposals will move into the second stage of the evaluation.

System Requirements:

The system **must** provide capabilities in the following modules, functions or services (category numbers and title(s) correspond to section numbers and titles of Attachment 1):

MODULE/FUNCTION/SERVICE	SECTION # ON ATTACHMENT 1
Mandatory	1
General	2
Attendance	3
Demographics	4
Discipline	5
Home Access	6
Mark Reporting	7
Master Scheduler Builder	8
Medical Records	9
Nutrition Services	10
Scheduling	11
Standards	12
Student Fees	13
Special Education	14
Success Plan	15
Teacher Access	16
Testing	17
Transportation	18

Stage Two

The finalist proposals will be subjected to a more detailed second stage evaluation that will include vendor provided demonstrations at SCUSD involving use of actual data on live systems using specific scripts provided by the SCUSD. Demonstrations will **take no more than five days** per finalist. The SCUSD may elect to provide the demonstration data or may elect to have the vendor provide data that

closely matches a K-12 district similar to SCUSD. At the option of the SCUSD, a “hands on” session with the product may also be requested. In addition to demonstrating application functionality and business processes performed using the system, the vendor will be required to describe and demonstrate the proposal’s technology and proposed hardware/software deployment strategy.

Demonstrations may be video-taped, recorded, or webcast for use by SCUSD and participating districts.

Note: The schedule for software demonstrations is very tight, and vendors must be ready to conduct a demonstration within two (2) weeks after notice of selection for Stage Two evaluation. The required demo scripts and schedule will be provided to the vendor at notification.

During the Stage Two evaluation period, interviews will be conducted with the finalist vendors to explore in detail the proposed implementation strategy and project plan and to discuss vendor qualifications and experience. SCUSD may choose to interview the vendor’s training team and ask them to demonstrate portions of sample training sessions.

References will be checked to address issues raised by the demonstrations and interviews or to answer detail questions not yet resolved. Visits to sites using the proposed software may be conducted during the stage-two evaluation. Vendors may be asked to help arrange these site visits, but **not** to attend the visits.

System performance will be a critical decision factor during the demo and selection processes. The following chart describes potential performance tests that may be required during the demonstration phase.

Application/Function
Log on to system: Assume workstation is powered on and in a state from which application system can be launched. Time required to reach the application system's menu or first screen after system login has been completed.
Single inquiry function from point of transmit to display of response.
Moving from one screen to another.
Perform single field edit with error from point of transmit to display of error message.
Single add or update function from point to transmit to display of response signaling a valid operation.
Scheduling run for 3,000 High School Students
CSIS CBEDS reporting process for 25,000 students
Ad hoc query returning results against an entire year’s worth of data for 3,000 student school.

In addition to initial evaluation criteria, final selection will be based on the following criteria:

- Application Requirements (Attachments 1-5)
- Software Costs
- Service Costs
- Software demonstration
- Vendor Qualifications/References
- Implementation & Project Work Plans
- Technology Requirements

This is a negotiated procurement and, as such, the contract will not necessarily be awarded to the vendor submitting the lowest priced proposal. Award will be made to the firm submitting the best responsive proposal satisfying SCUSD'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. If such negotiations are conducted, the following conditions shall apply.

- ☐ Negotiations may be conducted in person, in writing, by telephone or a combination of these methods.
- ☐ Negotiations will only be conducted with potentially acceptable responses. SCUSD reserves the right to limit negotiations to those responses, which receive the highest rankings during the initial evaluation phase.
- ☐ Terms, conditions, prices, methodology, or other features of the vendor's response may be subject to negotiation and subsequent revision. As part of the negotiations, the vendor 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.

ACKNOWLEDGEMENT FORM

Having carefully read the Scope of Work and Special Conditions, the undersigned hereby agrees to furnish all goods and services specified in the Request for Proposals for Sacramento City Unified School District at the prices and transportation costs as proposed.

By submission of this proposal, the undersigned certifies that:

a. This proposal has been independently arrived at without collusion with any other bidder or any other competitor;

b. This proposal has not been knowingly disclosed and will not be knowingly disclosed, to any other bidder, competitor or potential competitor, prior to the opening of bids, or proposals for this project;

c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not submit a proposal;

d. The undersigned certifies that he is fully informed regarding the accuracy of the statements contained in this certification, and the penalties herein are applicable to the bidder as well as to any person signing in his/her behalf;

e. Vendor warrants it has no interest, and shall acquire no interest that would directly or indirectly conflict in any manner or degree with the performance of this proposal. For violation or breach of this warranty, SCUSD shall have the right to annul this contract without liability;

f. The undersigned certifies that to his/her knowledge no SCUSD employee has any personal or beneficial interest whatsoever in this service or property described herein.

g. The undersigned acknowledges that this document, as well as any submitted documents and any negotiations, when properly accepted by the District will be an integral part of any contract awarded as a result of the response submitted.

Signature

Printed Name & Title

Date

DEVIATION FORM

All deviations to the Specifications must be noted on this sheet. In the absence of any entry on this Deviation Form, the Vendor assures SCUSD of their full compliance with the Specifications and Conditions. The form may be duplicated as needed.

THIS DEVIATION FORM MUST BE SIGNED BY EACH VENDOR WHETHER THERE ARE DEVIATIONS LISTED OR NOT, AND SUBMITTED WITH THIS PROPOSAL.

Page/Item#_____

Deviation

1. _____

Page/Item#_____

Deviation

2. _____

Page/Item#_____

Deviation

3. _____

If proposal contains no deviations, please check the box. ☐