



SCHOOL BOARD ACTION REPORT

DATE: October 10, 2017
FROM: Dr. Larry Nyland, Superintendent
LEAD STAFF: John Krull, Chief Information Officer, 206-252-0321,
jkrull@seattleschools.org
Nancy Petersen, Director Enterprise Applications and Data Services,
206-252-0480,
nlpetersen@seattleschools.org
Caleb Perkins, Director of College and Career Readiness, 206-252-0062,
cbperkins@seattleschools.org

For Intro: October 18, 2017
For Action: November 1, 2017

1. TITLE

Award three-year contract to Hobsons' Naviance for new Career and College Readiness software solution, services, and support

2. PURPOSE

The purpose of this Board Action Report is to approve a three-year contract with Hobsons' Naviance to provide career and college readiness and planning technology to eighth through twelfth grade students, their counselors/teachers, their parents/guardians, and administration/office staff. Design and implementation is expected to begin in the 2017-18 school year.

3. RECOMMENDED MOTION

I move that the School Board authorize the Superintendent to execute a contract with Hobsons' Naviance in the total amount of \$619,538.00 over three years, for a Career and College Readiness software solution in the form of the draft Agreement dated October 5, 2017 and attached to the School Board Action Report, with any minor additions, deletions, and modifications deemed necessary by the Superintendent, and to take any necessary actions to implement the contract.

4. BACKGROUND INFORMATION

a. Background

In its 2013 to 2018 strategic plan, the district identified the strategic necessity of improving its capability to meet students' needs and strengthen school, family and community engagement. Goal Two, Strategy Three, states: "Integrate and align operational, business, technology and academic systems to support the needs of students, teachers and schools".

On February 9, 2016, voters of the City of Seattle approved the Buildings, Technology and Academics IV (BTA IV) Capital Levy providing \$475.3 million in funding for

capital improvements. Included in this levy was \$104.7 million allocated towards improvements in technology. The Career and College Readiness software is one of the systems allocated for levy funds.

One of the key recommendations of the 24-credit planning task force is to adopt and deploy a districtwide, electronic High School and Beyond planning platform.

A High School and Beyond plan is one of the outputs of a typical career and college readiness platform. The purchase and implementation of a district-wide career and college readiness tool is intended to guide students, in collaboration with counselors, teachers and parents, to discover career goals and to plan their educational path to achieve them.

The current student counselor caseload is now over 400:1, whereas the American School Counselor Association (ASCA) recommends a student-to-counselor ratio of 250:1. The 24-Credit Task Force is calling to reduce counselors' caseloads to the ASCA recommended ratio. Community input gathered by the 24-Credit Task Force states that large counselors' caseloads was hindering a high quality, meaningful High School and Beyond planning process. While counselors are doing their best to meet the needs of their students, this is currently a very labor intensive process. An online tool will assist students and counselors to do meaningful research and planning for the students' future.

A career and college readiness tool provides a wide range of direct services to students. This RFP is school and counselor driven. Counselors have been looking for this type of tool for several years. Individual schools are currently using similar tools, eager to get these resources to students. In addition to providing students with robust college and career exploration and planning support, the tool will also provide counselors with time saving features like electronic transcript provisioning. It will also support counselors with developing master schedules that align to student college and career goals. Most importantly, counselors are committed to eliminating the opportunity gap by insuring that all students have access to high quality college and career exploration and planning support, not just the students who can afford to pay privately for these services.

b. Alternatives

Interim Online Washington School Information Processing Cooperative (WSIPC) High School and Beyond Plan Authoring Tool

This approach only automates the basic paper process. The system is integrated with the Seattle Public Schools (SPS) student information system, PowerSchool. A student's High School and Beyond plan, a part of career and college readiness planning, is authored and stored online. Guidance is provided through visual sections that organize the work needed to meet the State requirements of the High School and Beyond plan.

This tool does not relieve any counselor workload, nor provide assistance in the planning process. For example, connecting careers and education paths to student skills and interests assessments are not integrated with this tool.

Continue Manual Career and College Counseling

This approach utilizes current counseling methods without electronic tools to minimize the need for manual research and planning.

It does not relieve any counselor workload, encourage family collaboration, nor provide much assistance in the planning process. A counselor cannot adequately help all the students in their caseload. Their work with each student is necessarily brief. Students are frequently left to research options, and make the connection from their high school education to their desired post high school goals on their own.

This approach does not serve our students well or support the district's strategic plan.

c. Research

Research was done to find the options and tools available for a career and college readiness platform. First, the district has a small number of individual secondary schools currently using Hobsons' Naviance and Career Cruising – two tools well established in this industry. Next, online search results identified an additional eleven integrated solutions in the career and college readiness platform space.

Additionally, informational interviews were conducted with four school districts in Washington State (Highline, Sumner, Everett, and Spokane) to understand the human resources needed for the implementation, end user adoption, and ongoing support specific to Hobsons' Naviance and Career Cruising. It was assumed a similar experience could be expected for any of the solutions identified. The conversations were unscripted except for the opening request of "tell us about your lessons learned." The general themes identified from these conversations were:

- A minimum of one permanent, dedicated, full-time resource at the central office is needed for the initial and ongoing implementation to be successful.
- One or more staff who are trained as solution experts and designated as "school leads" are needed in each school to ensure end user adoption.

Finally, the RFP02760 Career and College Readiness Software was developed and published to gather vendor responses. For this Request for Proposal (RFP), vendors were required to respond to 169 functional requirements and 118 technical requirements, as well as provide a narrative response to the RFP for the categories of Implementation and Approach, Vendor Qualifications and Experience with K-12 districts of similar size. Functional requirements were identified by counselors and include the categories of Application Process, Communication, Community Based Organizations, Course Waivers, Curriculum, Equity, Event Management, Experiences, Exploration, Family Engagement, Financial Aid, Goals, Graduation, High School and Beyond Plan, Jobs, Letters of Recommendation, Online Course Requests, Portfolios, Readiness Indicators, Research, Scheduling, Student Data, Student Interactions, Student Records, Student Supports, Surveys, Tests, Transcripts, and Transitions.

5. FISCAL IMPACT/REVENUE SOURCE

Fiscal impact to this action will be \$619,538.00 over three years.

The revenue source for this motion is Buildings, Technology and Academics IV (BTA IV) levy.

Expenditure: One-time Annual Multi-Year N/A

Revenue: One-time Annual Multi-Year N/A

6. COMMUNITY ENGAGEMENT

With guidance from the District’s Community Engagement tool, this action was determined to merit the following tier of community engagement:

Not applicable

Tier 1: Inform

Tier 2: Consult/Involve

Tier 3: Collaborate

Stakeholders for this initiative include students, counselors, parents and guardians, teachers, and District staff.

Feedback received as a result of community engagement was in the form of survey responses by student, parent and guardian, and counselor participants, who were given access to test sandbox instances of software for the vendor finalists. Participants were gathered as volunteers through High School Principal outreach, Counselor outreach, and selected interested Staff members. An activity was organized for the participants to conduct vendor software testing in a sandbox environment. Ballard High School, Chief Sealth International High School, Center School, Ingraham High School, Rainier Beach High School, and West Seattle High School all provided participants in the sandbox testing. The Counselors and Career Center Specialist participants support these schools, whose student populations represent a very wide range of ethnic and socio-economic backgrounds. The student participants represented a diverse demographic that included Special Education, English Language Learner, International Baccalaureate, and College Bound Scholarship/Free and Reduced Lunch students. Ethnicity was also diverse for these students, which included Hispanic, Native American, African, and Eastern European Caucasian. Their feedback was used as input into the RFP Vendor Response evaluation and selection process.

7. EQUITY ANALYSIS

While no specific activity was done to evaluate racial equity impact of this project, there have been deliberate efforts made to gather input from stakeholders of a wide range of demographic groups. In addition, this software platform will be implemented for all eighth through twelfth grade students district-wide. The content will be presented at the sixth grade level appropriate for many students with special needs.

Currently, a few individual schools have purchased a career and college readiness tool for their school student's use only. Additionally, students that have the means are able to pay for private college counselors. These private counselors use the same type of college and career readiness tool that the district is looking to purchase.

Providing a career and college readiness tool at the district level eliminates this opportunity gap and provides equal access to a high quality career and college readiness planning tool.

8. STUDENT BENEFIT

This action will enable access for all secondary school students to a robust online career and college readiness software suite. From interest and skills assessments, related career opportunities, education paths and post-secondary opportunities, students will connect how the work they do in school leads to achieving their career goals. They will learn to plan their high school and post-secondary education and track progress, make adjustments along the way, and achieve their career plan.

9. WHY BOARD ACTION IS NECESSARY

- Amount of contract initial value or contract amendment exceeds \$250,000 (Policy No. 6220)
- Amount of grant exceeds \$250,000 in a single fiscal year (Policy No. 6114)
- Adopting, amending, or repealing a Board policy
- Formally accepting the completion of a public works project and closing out the contract
- Legal requirement for the School Board to take action on this matter
- Board Policy No. _____, [TITLE], provides the Board shall approve this item
- Other: _____

10. POLICY IMPLICATION

Per Policy No. 6220, Procurement, any contract over \$250,000 must be brought to the Board for approval.

11. BOARD COMMITTEE RECOMMENDATION

This motion was discussed at the Operations Committee meeting on June 15, 2017. The Committee reviewed the motion and moved it forward to the full Board with a recommendation for consideration. Additionally, this motion was brought to the Operations Committee meeting on September 7, 2017 as a Special Attention Item once the selected vendor and contract amount was finalized. Finally, this motion was brought to the Curriculum and Instruction Committee meeting on October 10, 2017 as a Special Attention Item for informational purposes only.

12. TIMELINE FOR IMPLEMENTATION

Upon approval of this motion, the contract will go into effect with the following established timelines for full implementation:

Setup and Configure Software	November 2017
Define School Requirements	November 2017 – December 2017
Design and Build Functionality- Including interfaces	January 2018 – March 2018
User Acceptance Testing	April 2018 – August 2018
Training and Implementation	August 2018
Operations and Support	September 2018 – October 2018

13. ATTACHMENTS

- RFP02760

Seattle Public Schools
Contracting Services
2445 Third Avenue South
Seattle, WA 98134
Telephone: (206) 252-0566
Fax: (206) 743-3018
contractingservices@seattleschools.org

Request for Proposal No. RFP02760

**Career and College Readiness Software
for
Seattle Public Schools**

Submittal Deadline:

Date: May 8, 2017

Time: 10:00 a.m.

Instructions

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- Attachment 1: Functional Requirements Form
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- Attachment 5: Voluntary Product Access Template (“VPAT”)
- Attachment 6: Compliance Inventory

REQUEST FOR PROPOSAL NO. RFP02760

PROPOSAL CERTIFICATION FORM

TO: Diane T. Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

- 1. That he/she has read the Seattle School District's Request for Proposal No. RFP02760 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

Addenda Number	Issue Date
_____	_____
_____	_____
_____	_____

- 2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
- 3. That the proposer's response is valid for 90 days.

Dated at _____, this _____ of _____ 2017.

(Signature)

(Title)

(Print Name)

(Email Address)

(Company Name)

(Telephone Number)

(Address)

(Fax Number)

(City)

(UBI Number)

(State)

(Zip)

1.0 INTRODUCTION

Seattle Public Schools (SPS or District) is requesting proposals from vendors for a career and post-secondary education planning software solution to enable all SPS middle school and high school students to identify their skills and abilities, explore career interests, discover post-secondary options, and plan their high school education to prepare for post-secondary paths. The District is interested in a single, end-to-end, commercial-off-the-shelf (COTS) solution that is either on premise or vendor hosted. The District's student information system is PowerSchool.

The District plans to implement this system initially for use by all eighth through twelfth (8th – 12th) grade students (it may expand to grades 6 or 7 over time), their parents/guardians, middle school and high school counselors, teachers and administrators along with central office staff.

This Request for Proposal (RFP) describes the selection process and documentation required for submitting a Proposal. Any firm failing to submit their proposal in accordance with the procedures set forth in the Request for Proposal may be considered nonresponsive.

It is the intent of the District to award the project listed above to one firm.

The selection of the firm will proceed in the following manner:

- **Seattle Public Schools shall receive proposals no later than the due date and time specified in Section 2.0 of this RFP.**
- An initial screening will follow, resulting in a short-list of one or more qualified firms that will be selected for interviews and demonstrations (if deemed necessary).
- The District may conduct interviews (if deemed necessary) with the selected firms, in accordance with a schedule to be determined by the Selection Committee in order to select the best proposals, all factors considered.
- Vendors selected as finalists will be expected to provide a demonstration of their product at a time and a date determined by the District. The District reserves the right to reject any firm who is unable to comply with the District's request for a demonstration.
- The District may award a contract based solely on the written proposals. However, the District may elect to engage in negotiations with a selected short list of vendors in order to improve the proposals and obtain the best contract(s) for the District.
- The final selection will be based upon the criteria set forth below. The District reserves the right to negotiate with the successful firm on pricing, scheduling, or other factors.

2.0 RFP SCHEDULE

2.1 Schedule of RFP Activities

RFP SCHEDULE

Date	Selection Process
April 19, 2017	Advertisement for Request for Proposal Published. (First Notice)
April 26, 2017	Advertisement for Request for Proposal Published. (Second Notice)
April 28, 2017	Pre-proposal conference at 2:00 p.m.
May 1, 2017	Last day for Questions from Proposers by 2:00 p.m.
May 8, 2017	Proposal Due by 10:00 a.m. via Email
May 9-12, 2017	Initial screening
Approx. May 17, 2017	Notification sent to short list candidate firms
Approx. May 24, 2017	Short list firms provide demo environment for end user demonstrations using non-District specific data
Approx. May 24-26, 2017	Short list firms' presentations/live demos at Seattle Public Schools
Approx. May 31, 2017	Notification of award to top candidate firm
Approx. June 14, 2017	Negotiation of Contract Finalized
June 28, 2017	School Board Introduction
July 5, 2017	School Board Action to approve contract
Approx. July 15, 2017	Anticipated Start Date

2.2 Pre-Proposal Conference

Interested firms are encouraged to attend a pre-proposal conference at the date and time listed in section 2.1 above, where any questions concerning the project will be discussed. The meeting shall be held at the John Stanford Center for Excellence in Education (JSCEE) at 2445 Third Avenue South, Seattle, WA 98124 at 2:00 p.m. Pacific Time on April 28, 2017. Remote participation is recommended. Please call 206-252-0320, #2 promptly at 2:00 p.m. Pacific Time to access the conference bridge.

3.0 QUESTIONS AND COMMUNICATION

All communication and/or questions shall be submitted in writing at the dates and times indicated herein to:

U.S. Mail: Diane Navarro
Contracting Services
Seattle Public Schools
M/S 22-337
P.O. Box 34165
Seattle, WA 98124-1165

Physical Location: Diane Navarro
Contracting Services
Seattle Public Schools
M/S 22-337
2445 Third Avenue S.
Seattle, WA 98134-1923

Phone: (206) 252-0566

Fax: (206) 743-3018

E-mail: contractingservices@seattleschools.org

All questions must be submitted electronically by e-mail or fax to Contracting Services by the date and time indicated in Section 2.1. Reference the RFP number in the subject of your email. The District will consider no telephone or in-person inquiries, except at the interviews/demos for those firms making the short-list.

Answers to questions will be issued in the form of an addendum that will be provided electronically on the Builders Exchange website at <http://www.bxwa.com/1024.html> and on the Seattle Schools website at www.seattleschools.org/district/departments/procurement/current_solicitations/.

Proposals must be submitted ELECTRONICALLY via e-mail, and the Subject Line of e-mail shall note the RFP number and Project Title.

In the event that a firm attempts to contact any official, employee, or representative of Seattle Public Schools in any manner contrary to the above requirements, said firm may be disqualified for further consideration.

This prohibition does not apply to:

- Telephone calls to the District to request copies of this RFP, to confirm attendance, or request directions relative to an interview notification received from the District;
- Delivery of written questions about the proposal;
- Discussion at the interview (if deemed necessary);
- Delivery of the firm's proposal.

4.0 BACKGROUND

In the District, there are currently 99 schools with approximately 54,976 total enrollments. Breaking out by grade levels, there are 12 high schools (9-12), 11 middle schools (6-8) – with two more opening for the 2017-18 school year, 11 K-8 schools, 59 elementary schools (K-5) and 7 service schools. More District information is available at www.seattleschools.org under District Fast Facts.

In its 2013 to 2018 Strategic Plan, the District identified the strategic necessity of improving its capability to meet students' needs and strengthen school, family and community engagement. Goal 2, Strategy 3: *"Integrate and align operational, business, technology and academic systems to support the needs of students, teachers and schools"*.

On February 9, 2016, voters of the City of Seattle approved the Buildings, Technology and Academics (BTA IV) levy providing \$475 million in funding for capital improvements. Included in this levy is \$30 million allocated towards improvements to student and business systems.

The District is looking for a career and post-secondary education planning software solution to enable all SPS middle school and high school students to identify their skills and abilities, explore career interests, discover post-secondary options, and plan their high school education to prepare for post-secondary paths. There are currently individual schools using site-based career and college planning tools with no central student data import or District technology support. In addition, a number of schools rely on paper-based forms for course and graduation planning. The purchase and implementation of a district-wide career and post-secondary education planning tool is one of the systems allocated for levy funds.

The District plans to implement this system initially for use by all eighth through twelfth (8th – 12th) grade students (it may expand to grades 6 or 7 over time), their parents/guardians, middle school and high school counselors, teachers and administrators along with central office staff.

5.0 PROJECT INFORMATION

The District has approximately 18,300 eighth through twelfth grade students. This student count is comprised of 14,500 high school students and 3,800 eighth grade middle school students.

Approximately 100 counselors serve this secondary school student population.

The anticipated solution capabilities include (by user):

Students:

- Identifying and assessing their interests, skills, and abilities
- Developing middle school and high school course plans that support graduation requirements and career pathways
- Managing their progress toward high school graduation
- Understanding college admission requirements, admission tests, and financial aid options
- Creating resumes and portfolios that highlight their activities and accomplishments
- Gaining knowledge of the financial aid system and its associated timelines and documentation requirements
- Exploring careers and post-secondary education options
- Managing their application-related deadlines and plans for submitting required paperwork such as letters of recommendation and transcripts within those deadlines
- Breaking down activities into manageable pieces, which students can master automatically as they transition from middle school to high school and progress through high school to their post-graduation years
- Communicating pertinent information to counselors, teachers, parents and guardians

Counselors:

- Automating common workflows to increase process efficiencies resulting in more time available to work with students
- Sharing a wide range of relevant and robust post-secondary resources with students of all abilities and backgrounds
- Monitoring student activities and progress including alerts based on thresholds (business rules)
- Delivering applicable curriculum in partnership with teachers
- Documenting interactions with students, parents and guardians
- Preparing and delivering student-specific correspondence
- Communicating pertinent information to students, parents and guardians, teachers

Parents and guardians:

- Understanding their student's graduation, pathway, and course plan progress
- Viewing feedback from counselors and teachers on their student's progress
- Accessing, completing, and submitting online forms
- Communicating pertinent information to counselors, teachers, their student(s)

Teachers:

- Delivering applicable curriculum in partnership with counselors
- Preparing, delivering, and tracking letters of recommendation
- Communicating pertinent information to students, counselors, parents and guardians

Central office/district staff:

- Accessing and managing student-level, school-level, and district-level data
- Providing reports and/or data automatically to other SPS technology solutions and partner organizations

Seattle Public Schools (SPS) plans to setup, integrate, configure, and validate a secure Career and College Readiness planning and authoring system for all students in the 8th through 12th grades, their parents/guardians, and their advisors (Counselors and Teachers) by the end of the 2017-18 school year. Implementation for all students in 8th - 12th grades will begin the following school year.

The District is seeking an online tool that will increase a counselor's ability to communicate with students and support students in the areas of career and college readiness. The tool will provide students and families with access to course-taking patterns, as well as career and college post-secondary options related to courses taken.

The District, through this Career and College Readiness online tool, expects to adopt a district-wide solution that:

- Links to our current Student Information System (PowerSchool).
- Is supported centrally, thereby ensuring a secure environment for student data.
- Can be utilized by students, families, and counselors to assist all students in exploring Career and College avenues and creating and tracking to a robust Plan.
- Protects student privacy in compliance with FERPA and District procedure.

5.1 SPS Proposed Project Timeline:

This is a preliminary timeline to assist you in creating an implementation plan. Your implementation plan may follow this exactly or suggest changes based upon implementation requirements.

PROJECT TIMELINE

Date (Anticipated)	Project Deliverable
July-September 2017	Backend platform setup and initial configuration.
October to December 2017	Gap Analysis and Design - including configuration, customization, software interfaces, data conversion, any custom components, and developing the training plan.
January to March 2018	Configuration and Customization - including development and unit testing of configurations, customizations, interfaces, any custom components, data conversion scripts and developing test plans and test cases
April to August 2018	Testing and Implementation - including system testing, acceptance testing, data migration and data validation testing, developing support materials, and vendor-delivered training
September to October 2018	Operations and Support (Post-Go Live)

5.2 Training and Support

Initial user training and training materials will be developed in conjunction with the vendor. Ongoing technical support will also be developed and conducted in partnership with the vendor.

5.3 System Requirements

a. Functional Requirements

The District has attached functional requirements. Please review and complete attachment (Noted as **Attachment 1** in proposal contents).

b. Technical Requirements

The District has attached technical requirements. Please review and complete attachment (Noted as **Attachment 2** in proposal contents).

5.4 Product Accessibility

Seattle Public Schools is committed to making its technology-related products and services accessible to individuals with disabilities in compliance with applicable law and technical standards. Firms submitting proposals to this RFP must voluntarily disclose information bearing on whether the firm's proposal complies with Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d), as amended, all other regulations promulgated under Title II of the Americans with Disabilities Act, and the accessibility standards of the Web Content Accessibility Guidelines ("WCAG") 2.0 AA. To facilitate this disclosure, shortlisted firms will be required to submit a completed Voluntary Product Access Template ("VPAT") to the District for verification (**Attachment 5**).

Please note that the District will select the successful firm/s based on the best interests of the District, all factors considered. The District reserves the right to reject any or all proposals, waive minor irregularities and informalities, and make the awards in its best interest.

6.0 **SELECTION PROCESS**

6.1 Method of Selection

1. The District will review all proposals and select a solution based upon the best interests of the District, all factors considered. The District reserves the right to conduct interviews and/or demonstrations with the top firms, if deemed necessary.
2. DEMONSTRATIONS: (Shortlist Firms only): The short-listed firms are to provide a demonstration of their product based on use cases provided at time of finalists notification.
3. RATING: The District intends to select a firm based upon the best interests of the District, all factors considered. Among the factors to be considered are the following:

EVALUATION CRITERIA	POINTS
Technical Qualifications – 50 points	
Ability to meet the Functional Requirements	25
Ability to meet the Technical Requirements	25
Implementation Approach – 20 points	
Approach and support for technical customer service	10
Approach and support for user training	10
Qualifications & Experience – 10 points	
Team experience, availability and capacity	5
Proven experience in working with similar or larger organizations, preferably in K-12 education	5
Pricing – 20 points	
Pricing considerations include: (1) comparative costs and services included in standard pricing; (2) any fees for additional professional services proposed or offered by the vendor, such as optional training and consulting support not included in standard pricing; and (3) estimated district-born costs for ongoing maintenance and support (included with standard pricing or additional fees for professional services)	20
Demo (Shortlisted Firms Only) – 20 points	
Ability to clearly demonstrate the requested tasks as well as ease of use	20

Based on the recommendation of the Committee, the District will enter into contract negotiations with a selected firm. Upon receipt of best and final proposals, the Committee will select the best proposal, all factors considered.

6.2 Notifications

The District will provide timely notifications to firms responding to the Request for Proposal upon selection of the recommended firm.

6.3 Seattle Schools Right to Reject

The District reserves the right to reject any and all proposals and re-advertise the RFP at any time prior to approval of the recommended firm and the negotiated agreement. All costs incurred in the preparation of the Request for Proposal process shall be borne by the proposing firm.

Proposals submitted in response to this Request for Proposal shall become the property of the District and be considered public documents under applicable Washington State laws.

The District reserves the right to modify the scope of services as a result of the written submittals and/or interviews.

6.4 Procedures Requirements

Any firm failing to submit information in accordance with the procedures set forth herein may be considered non-responsive.

7.0 SUBMITTAL REQUIREMENTS

7.1 General Submittal Requirements

The submittal requirements shall be as follows:

SUBMITTAL METHOD: The proposing firm, joint venture or other form of association (“firm”) shall submit one ELECTRONIC copy of their Proposal for the project sent via e-mail to contractingservices@seattleschools.org. The Subject Line of e-mail shall note the RFP number and Project Title.

Each proposal is to be a maximum of twenty (20) pages (8-1/2” x 11”) single sided, not smaller than 12 point type. Please combine the sections below into one PDF with each section bookmarked within the PDF.

1. The cover letter, Proposal Certification Form, table of contents, tabs and attached forms (including supporting exhibits/appendices for attachments) do not count toward the page limits.
2. Project cut sheets, including photos, are included in the page limits. Submittals exceeding the page limits may be considered non-responsive.
3. **Please Note:** In preparing the firm’s submittal, the proposing firm shall clearly identify the designated person of record responsible for any referenced project. If the proposing firm is representing an individual’s experience while employed at another firm, the firm of record for the project and the individual’s role shall be clearly identified.

7.2 Contents of the Proposal

1. Signed Proposal Certification Form (page 3 of the RFP). This does not count towards the page limit.
2. Table of contents (maximum 1 page).
3. Separate section: Executive Summary.

Provide a summary highlighting the firm’s qualifications and special expertise to provide the services requested in the Request for Proposal.

4. Separate section: Company Profile.

- a. Identification of firm (or firms, if a joint venture or association) including address, telephone number, email address and date firm(s) were established.
 - b. Areas of specialization of the firm.
 - c. Provide total size and breakdown of firm personnel by category. A firm organizational chart would be useful.
5. Separate section: Qualifications and Experiences.
- a. List a maximum of five (5) recent K-12 projects or other projects, which most closely relate to the firm's qualifications for this proposal that briefly describe the scope and costs associated with each project.
 - b. List recent school districts where similar projects have been recently implemented by your firm.
 - Provide the client name, address, email address and client's project representative and telephone number for the firm's three (3) most recent projects that most closely relate to the firm's qualifications for this project. If a joint venture or other form of association, provide reference information for each member firm.
6. Separate section: Project Approach.
- a. In narrative form, briefly discuss your approach and techniques proposed for the main phases of this project including an implementation plan, infrastructure configuration and initial use training. Please include any recommended roles, resources/staffing, and training/support. Please describe any consulting services recommended.
 - b. Describe support for requirements gathering, functional & technical design, testing and launch.
 - c. Describe initial-use training for appropriate students, counselors, parents/guardians, teachers, central office/district staff.
 - d. Describe ongoing maintenance agreements and post-launch support for system administrators and end users.
 - e. On-going support: What roles and staffing levels are required on an ongoing basis after initial implementation to support/maintain the solution (configuration updates, security changes, etc.)?
7. Separate section: Product Design, Features & Functionality
- a. Provide a brief summary overview of the key design features and functionality of the product(s) or solution(s) offered and describe how they meet the requirements specified by Seattle Public Schools in this RFP.
 - b. Insert your completed **Attachment 1, Functional Requirements Form** in this section. This attachment and any supplemental documentation will not count towards your page limit.

- c. Insert your completed **Attachment 2, Technical Requirements Form** in the section. This attachment and any supplemental documentation will not count towards your page limit.
 - d. **IMPORTANT**: Please email Contracting Services at contractingservices@seattleschools.org to obtain Attachments 1 and 2 in MS Excel format. The District would like firms to **submit the completed Attachments 1 and 2 in both .PDF and .XLS format.**
8. Separate section: **Team Organization, Availability and Capacity.**
- a. Briefly discuss how you propose to organize your team to support this project. Identify each of the key players and define their roles and responsibilities. Describe each of the key team members' relevant professional experience, certification and education in resume form. Highlight implementation and integration experience with Power School.
 - b. Briefly discuss the availability of all key personnel for the scheduled time frame of the proposed project, and identify their proposed location during provision of the requested services. Additionally, discuss the capacity of the proposed team, as a whole, to accomplish the work.
9. Separate section: **Pricing**
- a. Insert your completed **Attachment 3, Pricing Form**. Include details of your pricing model, such as number of users, dollar amount per user, etc. to explain pricing shown. The District would like expected pricing with initial contract periods of 1, 2 and 3 years.
 - b. Briefly discuss proposed pricing structure for proposed products and services. If applicable, describe the professional services (if any, such as support for initial user training or consulting services) that are included with standard licensing costs for products/solutions offered. For any additional proposed fees-for-professional services, please specify the itemized costs associated (e.g., individual hourly rates, travel costs, reimbursable and direct expenses, etc.)
10. Separate section: **Terms and Conditions**

Include any comments or proposed changes to the District's terms and conditions (**Attachment 4** to this RFP). Please note that the District reserves the right to reject any firm not willing to accept the District's terms and conditions as shown in the Standard Form of Contract.

7.3 **Product Accessibility Disclosure (Shortlisted Firms Only)**

Shortlisted firms will be required to provide product accessibility documentation. To facilitate this disclosure, firms shall submit a completed Voluntary Product Access Template ("VPAT"), which is attached to this RFP as **Attachment 5**. Beyond voluntary disclosures, the firm agrees that the system and services may be tested and approved by the District, or that the District may require that the firm submit certification from a third-party to demonstrate that the firm's proposal complies with the applicable law and technical standards as noted in Section 5.4. Firm will furnish such documents and information as may be reasonably requested by the District to evidence firm's compliance with the terms of this RFP. Firm may also be required to give the District temporary access to the products and services to run an automated or manual web accessibility test.

7.4 Demo Environment Information (Shortlisted Firms Only)

As part of our screening process, shortlisted firms will be expected to provide an active demonstration environment using sample “dummy data” reflecting the roles and transactions of a school district similar in size to SPS. This demo environment should allow a sample of SPS end users to experience the “look and feel” of the platform interface.

The demo environment should encompass, at a minimum, core capabilities of the software such as:

- Tools for students
- Tools for counselors and teachers (building level view)
- Tools for central office staff (district level view)
- Parent/Guardian Portal

In addition to core functionality, the demo also needs to cover a number of use cases that will be provided to the finalists once the finalists have been identified.

Please also note that the District reserves the right to ask questions and seek clarifications about the Proposal, to request post-proposal modifications, and to engage in negotiations with a selected short list of firms.

8.0 **CONTRACT AND CONTRACTING PROVISIONS**

8.1 Standard Form of Contract

The District’s Contract for Consulting Services is included as **Attachment 4**. The proposal should include any comments or requested changes. **Please note: The District reserves the right to reject any firm that is not willing to accept the District’s terms and conditions as noted in the standard form of contract.**

8.2 Contract Term

The term of this contract is expected to begin in July 2017 and reflect the implementation schedule, implementation pricing and post launch maintenance pricing identified in section 7.2.9.a. The District reserves the right to negotiate with the selected vendor the contract’s initial term options for 1, 2, and 3-year initial terms with annual renewals thereafter.

The selected firm shall be required to provide the following documents to the District prior to execution of the contract:

- W-9 Form
- Washington State Business License
- Certificate of Insurance, including endorsement pages, with the following limits:

Liability Type	Limit
workers' compensation	statutory
employer's liability (stop gap)	\$1,000,000 each accident \$1,000,000 disease-policy limit \$1,000,000 each employee
commercial general liability	(per occurrence/aggregate)
bodily injury and property damage	\$1,000,000/\$2,000,000
personal and advertising injury	\$1,000,000/\$2,000,000
products and completed operations	\$1,000,000/\$2,000,000
fire legal liability	\$100,000
automobile liability (owned, non- owned, leased or hired)	\$1,000,000 per occurrence
umbrella/excess coverage	\$2,000,000 per occurrence
professional liability	\$1,000,000 each occurrence

8.4 Protest Procedures

- Any actual or prospective Vendor who is aggrieved in connection with the solicitation or award of this contract may protest to the District in accordance with the procedures set forth herein. Protests based on the terms in this Request for Proposal, which are apparent prior to the date established for submitting the proposal must be received seven (7) days prior to the submittal deadline. Protests based on other events must be received within three (3) working days after the aggrieved person knows, or should have known, of the facts and circumstances upon which the protest is based; provided, however, that in no event shall a protest be considered if all proposals are rejected or if the protest is received after the award for this contract.
- In order to be considered, a protest shall be in writing and shall include: the name and address of the aggrieved person; the contract title under which the protest is submitted; a detailed description of the specific grounds for protest and any supporting documentation; and the specific ruling or relief requested. The written protest shall be mailed to:

JoLynn Berge
Assistant Superintendent for Business and Finance
Seattle School District No.1
MS 33-300
P.O. Box 34165
Seattle, WA 98124

Or delivered to:

JoLynn Berge
Assistant Superintendent for Business and Finance
Seattle School District No.1
MS 33-300
2445 3rd Avenue South
Seattle, WA 98134

And shall be labeled: "Protest"

3. Upon receipt of a written protest, the District shall promptly consider the protest. The District may give notice of the protest and its basis to other persons, including Proposers involved in or affected by the protest; such other persons may be given an opportunity to submit their views and relevant information. If the protest is not resolved by mutual agreement of the aggrieved person and the District, the District will promptly issue a decision in writing stating the reasons for the action taken. A copy of the decision shall be mailed by certified mail, return receipt requested, or otherwise promptly furnished to the aggrieved person and any other interested parties. The District decision may be appealed to the Superintendent by written notice together with all supportive evidence, received at the address set forth in paragraph 2, not more than two (2) working days after receipt of the decision. The Superintendent's decision shall be final and conclusive.
4. Strict compliance with the protest procedures set forth herein is essential in furtherance of the public interest. Any aggrieved party that fails to comply strictly with these protest procedures is deemed, by such failure, to have waived and relinquished forever any right or claim with respect to alleged irregularities in connection with the solicitation or award. No person or party may pursue any action in court challenging the solicitation or award of this contract without first exhausting the administrative procedures specified herein and receiving the District's final decision.
5. Any Proposer submitting a proposal shall be deemed to have accepted these procedures.

End of Request for Proposal

ATTACHMENTS

Attachment 1: Functional Requirements Matrix

Attachment 2: Technical Requirements Matrix

Attachment 3: Pricing Form

Attachment 4: Sample Contract for Consulting Services

Attachment 5: Voluntary Product Access Template ("VPAT")

Attachment 6: Compliance Inventory