



ADMINISTRATION & FINANCE
PURCHASING DIVISION
CITY OF WORCESTER, MA
455 MAIN STREET
ROOM 201, CITY HALL
WORCESTER, MA 01608
(508) 799-1220



Christopher J. Gagliastro, MCPPO
Purchasing Agent

RFP NO.: 7445-W1
ISSUANCE DATE: 8/17/2020

BUYER: Christopher J. Gagliastro

AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER
REQUEST FOR PROPOSALS
NOTICE TO PROPOSERS

RFP TITLE: Student Information System / WPS

REFER TO PAGE 7 FOR PROPOSAL SUBMISSION INFORMATION

General Conditions:

All proposals are subject to the terms, conditions and specifications herein set forth:

1. **Scope: Provide a contemporary Student Information System as per the attached requirements, terms & conditions, and specifications of the City of Worcester Public Schools.**
2. A certified check or bid bond made payable to the "City Treasurer, City of Worcester" in the amount of N/A must accompany this proposal. This must be submitted under separate sealed cover marked "Proposal Security." In the case of default, the surety shall be forfeited to the City as liquidated damages.
3. All terms and conditions are applicable to this proposal except the following section(s) which are hereby deleted from this RFP: 4, 27
4. A performance bond in the amount of N/A will be required. If this proposal is accepted by the City and the Proposer shall fail to contract as set forth in these requirements and to give a bond in the aforementioned amount, within ten (10) days, (not including Sundays, Saturdays, or a legal Holiday) from the date of the mailing of a notice from the City to the Proposer, according to the address given herewith, that the contract is ready for signature, the City may by option determine that the proposer has abandoned the contract and thereupon the proposal and acceptance shall be null and void and the proposal security accompanying this proposal shall become the property of the City as liquidated damages.

Any prospective proposer requesting a change in or interpretation of existing specifications or terms and conditions must do so within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal opening date. All requests are to be in writing to the Purchasing Division and are to be in duplicate. No changes will be considered or any interpretation issued unless request is in our hands within 5 days (Saturdays, Sundays, and Legal Holidays excluded) before scheduled proposal submission date.

Any inquiries related to technical or contractual matters must be submitted in writing to:

**Christopher J. Gagliastro, MCPPO
Purchasing Director
City of Worcester, City Hall
455 Main Street, Room 201
Worcester, MA 01608
gagliastroc@worcesterma.gov**

5. Nothing herein is intended to exclude any responsible Proposer or in any way restrain competition. All responsible Proposers are encouraged to submit proposals. The City encourages participation by Minority and Women Owned Business Enterprises (M/WBE).
6. The following meanings are attached to the defined words when used in this RFP.
 - a) The word "City" means The City of Worcester, Massachusetts.
 - b) The word "Proposer" means the person, firm or corporation submitting proposal on these specifications or any part thereof.
 - c) The word "Contractor" means the person, firm or corporation with whom the contract is made by carrying out the provisions of these specifications and the contract.
 - d) The words "Firm Price" shall mean a guarantee against price increase during the life of the contract.
7. All proposals and other documents relating to this RFP are subject to the public records provisions of M.G.L. c.30B, and shall remain confidential until the time specified in c.30B section 6 (d).
8. All material submitted by vendors becomes the property of the City. The City is under no obligations to return any of the material submitted by a vendor in response to this RFP.
9. Each vendor's proposal must remain in effect for at least 120 days from the deadline for its submission. The City will decide upon acceptance within 120 days of submission.
10. It is understood and agreed that it shall be a material breach of any contract resulting from this RFP for the Contractor to engage in any practice which shall violate any provision of

Massachusetts General Laws, Chapter 151B, relative to discrimination in hiring, discharge, compensation, or terms, conditions or privileges of employment because of race, color, religious creed, national origin, sex, age or ancestry.

11. The City reserves the right to accept or reject any or all of the proposals submitted and waive informalities and technicalities.
12. The City will review and analyze each proposal, and reserve the right to interview selected proposers. The City shall select the proposer, which in the City's opinion, has made the proposal best suited to the needs and goals of the City and its operations and deemed to be in compliance with the terms of this RFP.
13. The Contractor will be required to indemnify and save harmless the City of Worcester for all damages to life and property that may occur due to his or her negligence or that of his or her employees, subcontractors, etc. during the contract derived from this RFP.
14. The Contract Agreement will be drafted by the City's Law Department in compliance with the terms of the RFP, and may incorporate the terms of this RFP and of the proposal selected.
15. The Proposer must certify that no official or employee of the City of Worcester, Massachusetts, is pecuniarily interested in this proposal or in the contract which the proposer offers to execute or in expected profits to arise therefrom, unless there has been compliance with the provisions of G.L.C. 43 section 27, and that this proposal is made in good faith without fraud or collusion or connection with any other person submitting a proposal.
16. Any proposal withdrawn after time and date specified, the proposer shall forfeit deposit on proposal as liquidated damages.
17. A vendor conference will be held as follows: N/A
18. The Contractor shall not assign, transfer, sublet, convey or otherwise dispose of any contract which results from this RFP, or its right, title or interest therein or its power to execute the same to any other person, firm, partnership, company or corporation without the previous consent in writing of the City. Should the Contractor attempt any of the above without the written consent of the City, the City reserves the right to declare the Contractor in default and terminate the contract for cause.
19. The Contractor shall obtain and maintain in force at all times during the term of the contract derived from this RFP, insurance coverage pertaining to Public Liability, Property Damage and Worker's Compensation in the following types and amounts:
 - A) PUBLIC LIABILITY INSURANCE - Contractor to supply the City of Worcester with certificates of insurance covering public liability in an amount not less than \$1,000,000.00 to any one person, and not less than \$ 1,000,000.00 on account of one accident.

B) PROPERTY DAMAGE INSURANCE - Contractor to supply the City with certificates of insurance covering property damage in an amount not less than \$1,000,000.00 for damages on account of any one accident, and not less than \$ 2,000,000.00 on account of all accidents.

C) COMPENSATION INSURANCE - The Contractor shall furnish the City with certificates showing that all its employees shall be connected with the management operations are protected under worker's compensation insurance policies.

20. The Contractor shall carry Public Liability Insurance with an insurance company satisfactory to the City so as to save the City harmless from any and all claims for damages arising out of bodily injury to or death of any person or persons, and for all claims for damages arising out of injury to or destruction of property caused by accident resulting from the use of implements, equipment or labor used in the performance of the contract or from any neglect, default or omission, or want of proper care, or misconduct on the part of the Contractor or for anyone in his or her employ during the execution of the contract derived from this RFP.
21. Prior to starting on the contract derived from this RFP, the Contractor shall deposit with the Purchasing Division, certificate from the insurer to the effect that the insurance policies required in the above paragraph have been issued to the Contractor. The certificates must be on a form satisfactory to the City.
22. All prices quoted must include inside delivery, and set-up in place F.O.B. destination to pre-designated City of Worcester departments.
23. No special charges will be allowed for rigging, packing, crating, freight, express, or carriage unless specifically stated and included in the vendor's proposal.
24. The award to the successful proposer may be cancelled in the event of vendor nonperformance as may be determined by the City.
25. The successful proposer shall comply with all applicable federal, state and local laws, ordinances, and regulations. The awarded contract shall be governed under the laws of the Commonwealth of Massachusetts.
26. Purchases made by the City are exempt from Federal and Massachusetts state taxes and proposal prices must exclude any such taxes. Tax exemption certificates will be furnished upon request.
27. When the contract is executed, a performance bond, in the full amount of the contract, is required. See paragraph 4. The bond will be of a surety company qualified to do business under the laws of the Commonwealth of Massachusetts. The cost of this bond is the vendor's responsibility. Bonds shall remain in force and effect thru the performance of the contract.
28. Expenditures by the City and authorization to spend for particular purposes are made on

fiscal year basis. The City's fiscal year is the twelve month period ending June 30 of each year. The obligations of the City under any agreement to be reached are subject to the appropriation or authorization of the necessary funds. The City agrees to make reasonable efforts to obtain funding and all necessary authorization.

29. No amendment to the contract shall be effective unless it is in writing and signed by authorized representatives of both parties and is accepted by the City of Worcester.
30. The vendor (and its insurers, if any) shall bear all risk of loss or damage to the equipment which occurs in transit to the user site. The risk of loss or damage to purchased equipment shall remain with the vendor until the purchase price has been paid and title has passed. The vendor shall also bear the risk of loss or damage to leased or rented equipment during the City of Worcester's possession and use thereof subject, however to such conditions and limitations as may be stated elsewhere in the contract.
31. The vendor shall not assign or in any way transfer any interest in the contract without the prior written consent of the City provided, however, that claims for money due or to become due to vendor from the City may be assigned to a bank, trust company, or other financial institution without such consent so long as notice of such assignment is furnished promptly to the City. Any such assignment shall be expressly made subject to all defenses, set-offs, or counter-claims which would have been available to the City against the vendor in the absence of such assignment.
32. None of the services to be provided by the vendor pursuant to the contract shall be subcontracted or delegated to any other organization, association, individual, corporation, partnership or other such entity without the prior written consent of the City. No subcontract or delegation shall relieve or discharge the vendor from any obligation or liability under the contract except as specifically set forth in the instrument of consent. Any subcontract to which the City has consented shall be attached to the original of the contract on file in the City of Worcester.
33. Neither party will be liable to the other or be deemed to be in breach of the contract for any failure or delay in rendering performance arising out of causes beyond its reasonable control and without its fault or negligence. Such causes may include but are not limited to, acts of God or the public enemy, fires, floods, epidemics, quarantine restrictions, strikes, freight, embargoes, and unusually severe weather. If the vendor's failure to perform is caused by the default of the subcontractor, and if such default arises out of causes beyond the reasonable control of both the vendor and the subcontractor, and without the fault or negligence of either of them, the vendor shall not be liable for any excess costs for failure to perform, unless the equipment or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the vendor to meet the required delivery schedule. Dates or times of performance will be extended to the extent of delays excused in this section, provided that the party whose performance is affected notifies the other promptly of the existence and nature of such delay.

34. The vendor shall provide to the City of Worcester a warranty and a commitment which clearly states that all equipment and services proposed and supplied by the Vendor, and/or its subcontractors, performs as expected and promised by the Vendor.
35. The vendor represents that no person other than bona fide employees working solely for the vendor, have been employed or retained to solicit or secure this agreement upon an arrangement or understanding for a commission, percentage, brokerage fee, gift or any other consideration contingent upon the award or making of this contract. For breach or violation of the representation, the City shall have the right to annul the contract without liability, or in its discretion to deduct from the contract price or consideration, or otherwise recover the full amount of such commission, percentage, brokerage fee or other consideration.
36. Any contract made by the City in which the Purchasing Agent or any employee of his/her department, the heads of using agencies or any other officer or employee of the City having a part in the placing of such contract is financially interested, directly or indirectly, shall be void.
37. The vendor shall not discriminate against any qualified employee or applicant for employment because of race, color, national origin, ancestry, age, sex, religion or medical handicap. The vendor agrees to comply with all applicable Federal and State Statutes, rules and regulations prohibiting discrimination in employment including: Title VII of the Civil Rights Acts of 1964; The Age Discrimination in Employment Act of 1967; Section 504 of the Rehabilitation Act of 1973; Massachusetts General Laws Chapter 151B, Section 4 (1) and all relevant administrative orders and executive orders.

If a complaint or claim alleging violation by the vendor of such statutes, rules or regulations is presented to the Massachusetts Commission Against Discrimination (MCAD), the vendor agrees to cooperate with MCAD in the investigation and disposition of such complaint or claim.

In the event of vendor noncompliance with the provisions of this section, the City shall impose such sanctions as it deems appropriate, including but limited to:

- 1) Withholding of payments due vendor under the contract until vendor complies.
- 2) Termination or suspension of the contract.

SUBMISSION OF PROPOSALS

38. Proposals must be submitted in two (2) packages according to the instructions below. The City intends to consider responses in the evaluation requirements before considering costs. **Therefore, no reference to pricing may be made in the proposal of evaluation considerations.**

A sealed package containing **the original, 5 copies plus 2 electronic copies on USB drive** of the proposal **must** be labeled as follows:

Purchasing Agent, City of Worcester

Student Information System / WPS – Technical Proposal

455 Main Street, Room 201
Worcester, MA 01608

Re: **RFP No. 7445-W1**

A sealed package containing **the original, 2 copies plus 3 electronic copies in Excel format on USB drive** of the proposal **must** be labeled as follows:

Purchasing Agent, City of Worcester

Student Information System / WPS – Price Proposal

455 Main Street, Room 201
Worcester, MA 01608

Re: **RFP No. 7445-W1**

Price proposal sheets are located within the appendices / attachments to this RFP.

Proposals must be delivered no later than Wednesday, September 30, 2020 at 10:00 AM LOCAL TIME. Late submissions will be rejected, regardless of circumstances. The City of Worcester is not responsible for submittals not properly marked.

The evaluation and cost proposals will remain confidential until a formal and finalized contract has been executed.

RFP EVALUATION

39. The City of Worcester Purchasing Agent will assign an evaluation team, hereafter referred to as the Selection Committee, to perform a full and complete evaluation of RFP submittals. The Purchasing Agent will ultimately forward a formal recommendation of award to the City Manager who has final award authority.
40. RFP evaluation responses will be evaluated by the Selection Committee based directly upon vendor's response to mandatory and comparative evaluation criteria. Vendors must meet or exceed the mandatory criteria requirements or be rejected as non-responsive.

Comparative criteria will be evaluated by the use of four rating categories as set forth by M.G.L. Chapter 30B:

- 1) **HIGHLY ADVANTAGEOUS** - Vendor's submittal meets all the stated requirements and offers significant performance above the stated requirements.
- 2) **ADVANTAGEOUS** - Vendor's submittal meets the stated requirements without risk or disadvantage.
- 3) **NOT ADVANTAGEOUS** - Vendor's submittal contains some risk or disadvantage but is not unacceptable.
- 4) **UNACCEPTABLE** - Vendor's submittal fails to meet the standards of the stated requirements.

After proposals have been assigned ratings on the basis of each evaluation criterion, a composite rating will be established by the Selection Committee. Submittals will then be ranked based upon finalized composite rating.

41. The Purchasing Agent will identify the most advantageous proposal based upon the rankings of the Selection Committee and an evaluation of the cost proposals received. The Purchasing Agent will forward a recommendation for award to the City Manager based upon the most advantageous proposal received considering evaluation rankings and cost proposals received.

GIVE FULL NAMES AND RESIDENCES OF ALL PERSONS INTERESTED IN THE FOREGOING PROPOSAL.

(NOTICE: Give first and last name in full; in case of corporations, give corporate name and names of President, Treasurer, and Manager; and in case of firms give names of the individual members)

Name	Address	Zip Code
_____	_____	_____
_____	_____	_____
_____	_____	_____

KINDLY FURNISH THE FOLLOWING INFORMATION REGARDING BIDDER:

(1) If an Individual or Proprietorship

Name of Owner _____

Business Address _____

Zip Code _____ Telephone No. _____

Email _____

Home Address _____

Zip Code _____ Telephone No. _____

(2) If a Partnership, Full names and addresses of all partners

<u>Name</u>	<u>Address</u>	<u>Zip Code</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

Business Address _____ Zip Code _____

Tel. No. _____

(3) If a Corporation

Full Legal Name: _____

State of Incorporation: _____ Qualified in Massachusetts? Yes _____ No _____

Principal Place of Business _____

Street

P.O. Box

City/Town

State

Zip

Email: _____

Telephone No. _____

Place of Business in Massachusetts _____

Street

P.O. Box

City/Town

State

Zip

Telephone No. _____

GIVE THE FOLLOWING INFORMATION REGARDING SURETY COMPANY

Full Legal Name of Surety Company _____

State of Incorporation _____ Admitted in Massachusetts ? Yes _____ No _____

Principal Place of Business _____

Street

P.O. Box

City/Town

State

Zip

Place of Business in Massachusetts _____

Street

P.O. Box

City/Town

State

Zip

Telephone No. _____

NOTE:

The Office of the Attorney General, Washington, D.C. requires the following information on all bid proposals amounting to \$1,000.00 or more.

E.I. Number of bidder _____

This number is regularly used by companies when filing their "EMPLOYER'S FEDERAL TAX RETURN, U.S." Treasury Department Form 941.

AUTHORIZED SIGNATURE OF BIDDER

TITLE

DATE

UNDER MASSACHUSETTS GENERAL LAWS, CHAPTER 30B: SECTION 10, THE FOLLOWING CERTIFICATION MUST BE PROVIDED:

Section 10. A person submitting a bid or a proposal for the procurement or disposal of supplies, or services to any governmental body shall certify in writing, on the bid or proposal, as follows:

"The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals."

(Please Print)

Name of Person Signing Bid

Signature of Person Signing Bid

Company

No award will be made without vendor certification of the above.

All proposals must include the above non-collusion certificate with submission.

**Worcester Public Schools
City of Worcester**

**Request for Proposals (RFP) for a
Student Information System (SIS)
and Implementation Services
RFP # 7445-W1**

All questions about this RFP must be directed in writing to:

Mr. Christopher J. Gagliastro, MCPPO

Purchasing Agent

City of Worcester

455 Main Street, Room 201

Worcester, MA 01608-1895

Email address: gagliastroc@worcesterma.gov

Phone: (508) 799-1220

Opening Date:

Wednesday, September 30, 2020 on or before 10:00 a.m. EDT

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1.0 INTRODUCTION

1.1 Purpose

The Worcester Public Schools (WPS) in Massachusetts is asking for Proposals to provide a contemporary Student Information System. The comprehensive Student Information System described in this document is intended to support the WPS's vision of a fully integrated, cloud-based/web-hosted Student Information System.

The WPS's primary goal for this Request for Proposals (RFP) is the selection, implementation, and operation of a Student Information System that will meet the needs of the WPS for the next ten years and beyond. WPS seeks a vendor who will grow with the WPS's needs and provide functionality beyond the initially defined product life cycle period.

WPS has procured the services of the Center for Educational Leadership & Technology (CELT) to facilitate requirements gathering, RFP development, and the selection process. An internal WPS project team is overseeing the entire selection process.

Student Information System Requirements

The WPS requires various modules associated with a Student Information System (SIS) such as registration, enrollment, student demographics, attendance, graduation, transcripts, grade book, grade reporting, discipline, activities, programs, eligibility, testing, student assessment, scheduling, special programs, health, guidance and special services, RTI, reports and data analytics, MA DESE reporting, and teacher, student and parent portals.

The detailed functional requirements for the Student Information System can be found in Appendix A with instructions for vendor response.

Massachusetts K-12 State Reporting Requirements

The proposed system must have the ability to meet the rigorous state reporting requirements.

The MA DESE main web site is:

<http://www.doe.mass.edu/infoservices/data/schedule.html>

Details for MA State Reporting are found under the Information Services section:

<http://www.doe.mass.edu/infoservices/>

The database manuals and technical assistance papers that define the requirements can be found at:

<http://www.doe.mass.edu/infoservices/data/sims/>

Student Information Management System information:

<http://www.doe.mass.edu/infoservices/data/sims/>

External Interfaces

The proposed SIS Information System will need to interface with other WPS systems that will share data. Interfaces included exported data that are used by external systems and operational systems that are accessing the SIS in real-time.

Additional details for all interfaces are in Appendix C and section 2.3 below.

Other Considerations

All student and school staff data will be imported into the proposed Student Information System as part of the implementation process by the software vendor with assistance from the WPS Information Technology department staff.

The vendor's RFP submittal will include ongoing software maintenance, as indicated on the cost sheets (Student Information System Total Cost Summary) in Appendix B. The Proposer must evaluate the overall operational requirements of its proposed solution and recommend appropriate hardware to satisfy the WPS's needs when fully implemented as part of the WPS-hosted SIS option.

The proposed solution must be a complete system consisting of software, hardware, installation, software customization, training, software support, and reporting.

A single supplier for systems design, software, hardware, installation, training, maintenance, and technical support for all the goods and services is preferred. However, the WPS may consider multiple Proposers if it is in the best interest of the WPS.

The WPS invites Proposals from all firms and, in the case of small firms that believe they may not have sufficient staff to handle the volume of work required, the WPS will accept joint Proposals from two or more firms, provided that the Proposal explains satisfactorily how the firms will coordinate their work and that the arrangement will not interfere with the provision of the services, as the WPS would only like to entertain complete solutions.

Significant emphasis is placed on the Proposer's written responses to Section 4 (Proposal Summary and Proposal Organization) and Section 7 (RFP Response Format and Contents) of this RFP, and to the Student Information System Functional Requirements Response Form (Appendix A), and to Student Information System Total Cost Summary Form (Appendix B).

1.2 RFP Organization

This RFP is divided into nine (9) sections, four (4) appendices, and three (3) attachments:

Sections:

- | | |
|-----------|--|
| Section 1 | Overview — consists of general information on the objectives of this RFP, a procurement schedule, and a procurement overview. |
| Section 2 | Background — provides background information pertaining to WPS requirements and current issues. |

Student Information System Request for Proposal # 7445-W1

- Section 3 **General Requirements** — provides general requirements for system scalability and performance, the interface with existing WPS systems, and how it fits in the overall scope of the WPS's plan.
- Section 4 **Proposal Summary and Proposed Organization** — provides a detailed presentation of the information Proposers are to cover in their written response to this RFP. Proposers are to follow the outline presented in Section 7.
- Section 5 **Procurement Procedure** — outlines the rules and schedules applicable to the planned procurement.
- Section 6 **Proposal Evaluation Process** — describes the procedure by which the WPS will review and rank the Proposals.
- Section 7 **RFP Response Format and Contents** — defines the information that must be contained in a Proposer's RFP response.
- Section 8 **Terms and Conditions** — describes the WPS terms and conditions for the RFP and provides WPS required forms to be completed by the Proposer.
- Section 9 **Required Forms and Documentation** — includes the required forms and documentation that must be submitted with the vendor's proposal to be considered complete.
- Appendices:**
- Appendix A** **Student Information System Functional Requirements Response Forms** — outlines the specific features and functions of the Student Information System to be met by the successful Proposer.
- Appendix B** **Student Information System Total Cost Forms** — provides the cost forms for summarizing the Proposer's prices for the Student Information System software, related installation services, software customization, data conversion, SIS training, WPS administrative software interfaces, software warranty, and maintenance services.
- Appendix C** **Current Technical Applications Environment** — presents a summary of WPS system interfaces with which the new SIS will need to communicate.
- Appendix D** **Training Table Templates** for use in Proposer's Response (from section 4)

Attachments:

Attachment A Master Address Repository (MAR) API Documentation

Please note: Appendices include files that support the vendor's response to the proposal with many components included in the scoring rubric. Attachments are reference or supporting documents that provide the vendor with important information to consider when developing their proposal.

1.3 Responding to the RFP

All times listed in this RFP are stated as Eastern Daylight Time.

CLOSING DATE AND TIME

The original Offeror's Proposal, submitted in response to this RFP, and signed by an officer of the Offeror with contractually binding authority, must be received by Wednesday, September 30, 2020, Mr. Christopher J. Gagliastro, Purchasing Agent, City of Worcester, 455 Main Street, Room 201, Worcester, MA 01608, no later than 10:00 a.m.

If Proposals/RFPs are hand delivered or delivered by a delivery service (i.e., UPS, Federal Express, or private courier) they shall be delivered to City of Worcester, 455 Main Street, Room 201, Worcester, MA 01608, ATTN: Christopher J. Gagliastro, MCPPO Purchasing Agent.

The WPS reserves the right to reject all Proposals at its discretion to the fullest extent allowed by law, and may also award, at its discretion, only portions of the Proposal submitted by the Proposer. The Proposer agrees, by submitting a Proposal, to all of these provisions and contingencies. The Proposer agrees that if it is awarded only portions of its Proposal, that it will cooperate fully and in good faith and deliver the portions that are awarded consistent with the requirements of the RFP and the contract. Additionally, if the WPS awards a portion of the Proposal to the Proposer and other portions of the system to another Proposer, then to the extent requested by the WPS and to the extent necessary in the ordinary course of achieving a satisfactory and cohesive Student Information System, the Proposer agrees and shall cooperate fully with the WPS and the other selected vendor or vendors in achieving an integrated and cohesive Student Information System. This section is supplemental to the WPS rights provided in Section 1.16, and both the WPS rights stated in this section and those rights stated in Section 1.16 shall apply and are reserved to the WPS.

AVAILABILITY OF FUNDS

It is understood and agreed between the parties to any agreement resulting from this Proposal that the Worcester Public Schools shall be bound hereunder only to the extent of funds available or that may hereinafter become available for the purpose of a resulting contract.

1.4 RFP Calendar

Please note that the following dates are subject to change based upon the impact that any COVID-19 resurgence should occur in Massachusetts impacting the fall start of school schedule. At this time, the WPS does not anticipate that the **Proposals Due date** will change.

Table 1.1 Calendar

Please note: The calendar below and dates therein are subject to change at the discretion of the City of Worcester and/or its Public Schools based upon the reopening of schools related to COVID-19 and public health directives.

Event	Date
Release/Post RFP	Monday, August 17, 2020
Bidder’s Conference/Webinar	Friday, September 11, 2020 – 2:00 p.m. - 3:00 p.m. EDT
Deadline for Vendor Inquiries	Monday, September 14, 2020 on or before 5:00 p.m. EDT
Post Responses to Vendor Inquiries	Friday, September 18, 2020 – 5:00 p.m. EDT
Proposals Due	Wednesday, September 30, 2020 on or before 10:00 a.m. EDT
Proposals prepared for distribution to WPS Selection Committee	Wednesday, October 7, 2020
Proposals Reviewed by the WPS Selection Committee	Tuesday, October 13, 2020 – Friday, October 16, 2020
Selection Committee Members meet to select the most qualified and responsive vendors	Wednesday, October 21, 2020
Procurement Office Notifies Finalists	Friday, October 23, 2020
Finalists’ Demonstrations	November 9 – 10 and November 12 - 13

1.5 Examination and Changes of RFP Documents

Proposer shall be solely responsible for examining the enclosed RFP Documents, including any Addenda issued during the Proposal period and for informing itself with respect to any and all conditions that may in any way affect the amount, nature of the Proposal, or the performance of the services in the event Proposer is selected. No relief for error or omission will be given.

Any changes to the RFP will be issued as an addendum and posted on the City website:

<http://www.worcesterma.gov/finance/purchasing-bids/bids/open-bids>

It is the vendors' responsibility to check the website for the latest updates.

1.6 RFP Inquiries

It is the responsibility of the proposed Offeror to inquire, in writing, about any portion of this RFP that the Offeror does not understand, including RFP procedures, questions, requirements, and technical specifications. The WPS will not be bound by verbal responses to questions. All inquiries concerning this RFP should be submitted to Mr. Christopher J. Gagliastro no later than 5:00 p.m. (EDT) on Monday, September 14, 2020.

Mr. Christopher J. Gagliastro
Purchasing Agent
City of Worcester
455 Main Street, Room 201
Worcester, MA 01608
Phone (508) 799-1220
gagliastroc@worcesterma.gov

Such inquiries must be in writing and may be emailed to the contact person above.

1.7 Pre-Proposal Conference Registration and Conference

All interested vendors who intend to submit a Proposal for the WPS's RFP # 7445-W1 may attend a voluntary virtual **Bidder's Conference** to be held on **Friday, September 11, 2020 from 2:00 to 3:00 p.m. EDT.**

Vendors interested in participating in the virtual Bidder's Conference are requested to complete the following survey with their interest to participate.

<https://forms.gle/yy68uRYrXLH6mFYUA>

The Bidder's Conference provides a forum for proposers to ask questions concerning this RFP. Questions submitted prior to the Bidder's Conference will be answered at the Bidder's Conference or by Addendum; however, only written questions and written answers regarding this RFP shall be binding.

<http://www.worcesterma.gov/finance/purchasing-bids/bids/open-bids>

1.8 Preparation of Proposal

The Proposal shall be formatted in accordance with Section 7 based upon the requirements specified in Section 4 herein. All Proposals shall be prepared by, and at the expense of, the Proposer.

Proposers should not assume that their past and/or current experience with the WPS demonstrates knowledge of the WPS's current needs or that the WPS Student Information System Software Selection Committee possesses knowledge of this experience. The evaluation of each Proposal will be based upon the evaluation criteria applied to their Proposal submission.

1.9 Submission of Multiple Proposals

The Proposal should conform to the requirements contained herein. Proposers submitting conforming basic Proposals **may** submit multiple Proposals as complete and **separate** offers, if the additional Proposals offer technical improvements or modifications, that are to the overall benefit of the WPS (e.g., vendor has multiple software offerings that provide the requested functionality). The WPS reserves the right to accept or reject any additional Proposal.

Oral, faxed, or emailed Proposals or modifications will not be considered.

1.10 Signing of Proposal/Authorization to Negotiate

Each Proposal submitted by the Proposer shall be executed by the Proposer or by its authorized officer. In addition, the Proposer must identify on the RFP Cover Sheet those persons authorized to negotiate on its behalf with the WPS in connection with this RFP.

1.11 Submission of Proposal/Period of Acceptance

Proposer should submit **six (6) paper copies** of their technical Proposal to the Issuing Office. Proposer shall also submit **two (2) electronic copies** (thumb or flash drive) of their technical Proposal with their response, each containing the final RFP response in both Word/Excel and PDF formats.

The Student Information System Total Cost Summary Forms must be submitted in a separate envelope consisting of **two (2) paper copy** and **three (3) electronic copies** (thumb or flash drive) in Microsoft Excel format.

Proposal shall be placed in an envelope or package and identified with the RFP number and the name and address of the Proposer.

Proposals must be submitted on 8-1/2 x 11 white paper and shall include a table of contents properly indicating the section and page number of the information included. Elaborate bindings or other presentation aids are not required and will not enhance the overall evaluation of the Proposal.

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All responses must include an RFP cover sheet (following Section 8 of this document). The cover sheet should include the names, addresses, and telephone numbers for the Offeror, authorized contact persons, authorized signatures (i.e., the owner or other responsible person of the agency), the nearest regional office, and members of the Offeror Proposal team.

All Proposals shall be accepted if received and date/time stamped in the Issuing Office no later than the closing date and time shown on the cover page. Proposals received and date/time stamped after the closing date and time will not be accepted and will be returned unopened.

Proposer may recite the contents of this RFP in their Proposal. However, in the event there is a discrepancy between this RFP (including subsequent addenda) and the RFP language included in Proposer's Proposal, the language of this RFP and its addenda shall prevail.

Offeror shall submit the following documents/information:

- Cover page of this RFP (following Section 8 of this document) with an original signature of an **agent authorized to bind the company**, title and all requested information.
- Acknowledgment of any addenda.
- Proposal as requested.

Proposals should be prepared simply and economically with emphasis on specific experiences and capability to perform work for similar government entities using a public procurement system. Information relating closely to those tasks outlined above will be weighed most heavily.

It is the Proposer's sole responsibility to assure that its Proposal is received as stipulated. In compliance with this RFP, the Proposer agrees to provide the services at the costs no higher than that stipulated in their Proposal if a final contract is approved by the WPS on or before 120 days after the date set for the opening of Proposals.

The WPS reserves the right to modify the contract to be consistent with the successful offer and to negotiate with the successful Proposer other modifications, provided that no such modifications affect the evaluation criteria set forth herein, or give the successful Proposer a competitive advantage.

The contractor shall notify the WPS in writing if sub-contractors will be used. The contractor shall list that part of the work the sub-contractor is to furnish or perform and assume complete responsibility for such sub-contractor's portion.

1.12 Evaluation of Proposals

All Proposals will be evaluated for responsiveness to the requirements of the RFP, and to the responsibility of the Proposer. A Proposal will be considered responsive if it complies in all material respects to the requirements of the RFP.

Section 6: "Proposal Evaluation Process" outlines the evaluation steps for this RFP.

After the formal RFP evaluation process, the selection committee will present the top-ranked firm to the WPS requesting permission to negotiate with that firm. The WPS may elect to award a contract to more than one Proposer. Should the WPS determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Offeror.

1.13 Award of Contract

The Selection Committee will analyze all RFP responses submitted in a timely manner and will follow the RFP evaluation process outlined in Section 6, "Proposal Evaluation Process" and standard procurement procedures. A final contract will be negotiated with the top-ranked firm.

The WPS will prepare and, to the extent permitted by the Procurement Act, negotiate the Contract (including the Appendices) with the apparent successful Proposer. Proposers may provide a sample Software License Agreement and Software Maintenance Agreement but acknowledge that the WPS has no obligation to adopt such samples. Failure to resolve contractual differences may lead the WPS to reject the proposer and move to the next most advantageous proposer.

The acquisition of any product, equipment, or service in connection with this RFP that is outside the scope of this project, is subject to the approval of the WPS.

Any contracts resulting from this RFP shall be awarded to the firm(s) whose Proposal meets the requirements of the RFP and is most advantageous to the WPS, as established by the criteria listed herein. Each category will be independently evaluated.

The contract as issued, will incorporate by reference the "Contract Documents," defined to include, but not necessarily be limited to, this RFP and the accepted RFP Response (although the WPS reserves the right to reject any objectionable terms of any such RFP Response, which terms then shall not be included in the Contract Documents) and the WPS/Vendor agreement.

Proposers within the competitive range may be required to participate in negotiations and to submit such additional cost, technical, or other revisions to their Proposal (or a Best and Final Offer) as may result from negotiations.

The Purchasing Director will notify the selected Proposer in writing of the award, after which the parties will be expected to enter into a contract, executed by their duly authorized representatives. Upon receipt of that fully executed Contract, Contractor shall commence performance under the Contract and upon receipt of a WPS purchase order.

1.14 Term of Contract

This contract will continue for a period of three (3) years after the initial “go-live” date. The WPS anticipates entering into a long-term Student Information System software maintenance agreement with the successful Proposer following the software warranty period. Proposers are requested to cost out maintenance services for three (3) years following the first-year warranty period.

1.15 Disclosure of Proposal Content

- A. All material submitted through this RFP becomes the property of the WPS and may be returned only at the WPS's option. All costs to the Proposer incurred relating to this RFP shall be borne solely by the Proposer. The WPS shall not be liable to any proposer, successful or unsuccessful, for costs of any kind or nature arising from or relating to the RFP.
- B. The WPS has the right to use any or all ideas presented in any reply to this Bid. Selection or rejection of any bid submittal does not affect this right.
- C. No provision in this Contract, including but not limited to any software license agreement or any maintenance agreement, whether or not separately executed, shall purport to limit, condition or preclude the City, or any department or employee thereof, from timely responding to the Massachusetts Public Records law. Without limiting the foregoing, the City shall not be required to delay or to notify the contractor of any public record request, and shall not be liable to the contractor for its response to such a request.

1.16 City Rights

The WPS may investigate the qualifications of any Proposer under consideration, require confirmation of information furnished by a Proposer, and require additional evidence of qualifications to perform the Services described in this RFP. Without limitation, the WPS reserves the right to:

- Reject any or all of the Proposals or to waive any irregularities or informalities in any Proposals.
- Issue subsequent Requests for Proposals.
- Cancel or amend this RFP prior to the Proposal due date. All amendments and additional information will be posted to the Purchasing Agent’s website listed below. Proposers are required to check this website frequently.

<http://www.worcesterma.gov/finance/purchasing-bids/bids/open-bids>

- Remedy technical errors in the Request for Proposal process.
- Appoint selection committees to review Proposals.

- Seek the assistance of outside technical experts in Proposal evaluation.
- Approve or disapprove the use of particular subcontractors.
- Negotiate with any, all, or none of the Proposers.
- Choose not to award a contract in the WPS's best interest.
- Award this contract to the vendor who in the WPS's opinion is most responsive and responsible and will perform in the best interest of the WPS. Price alone will not be the determining factor in the contract award.
- Determine whether or not a product is equal or equivalent to specifications.
- Retain Proposals and all submitted documentation.

1.17 Ownership of Products

Excluding licensed software and other mutually agreed upon products, all deliverables and products developed and delivered in association with any contract awarded as a result of this RFP shall be the property of and belong solely to the WPS.

Upon termination or expiration of the contract, the Proposer, if awarded, agrees that all WPS data may remain on the Proposer's software and will remain on the system platform until there is a successful transition into another system or platform. In no event, will the successful Proposer ever withhold WPS data and the WPS will have access to the data on the platform and in the format on the system software at all times, even if the parties are in a contractual dispute and following any default, cessation of the Proposer's business, sale of Proposer's business to another entity, bankruptcy of a Proposer, or any other circumstances. This provision shall be binding upon all successors, assignees, trustees, transferees, and purchasers of the Proposer.

1.18 No Contact with School Department, City, Board Member, or Consultant

Submission of the proposal certifies that no official or employee of the city of Worcester, Massachusetts, including but not limited to any official or employee of the Worcester Public Schools, is peculiarly interested in this proposal or in the contract which the Proposer offers to execute or in expected profits to arise therefrom, unless there has been compliance with provisions of G.L. c. 43, Sec. 27, and that this proposal is made in good faith without fraud or collusion or connection with any other person submitting a proposal.

Proposers shall not lobby any WPS or City Personnel regarding this RFP. All inquiries must be written and directed to the Purchasing Agent."

Any communication between vendors, contractors, consultants, or their representatives and WPS members may disqualify the vendor, contractor, or consultant from responding to the subject Request for Proposal.

1.19 Availability of Funds

The obligations of the Worcester Public Schools under any contract executed as a result of this RFP is subject to the availability of funds lawfully appropriated for its purpose. All purchases are contingent upon available WPS funding.

1.20 Representations

No representations or guarantees of any kind, either expressed or implied, are made with regard to the matters of information contained in this solicitation.

Proposers must rely solely on their own independent assessment as the basis for the submission of any offer made.

1.21 Student Information System Implementation Requirements

The installation of the goods, training, and services described in this RFP must be phased and scheduled to coincide with the WPS's operational needs based upon the software Proposer's best recommendations and practice.

The modules of the Student Information System will be implemented between November 2020 and December 2021, a span of approximately 13 months.

Upon execution of the contract in November 2020, the successful vendor and WPS will complete a desired phased implementation plan by November 27, 2020, to include, but not limited to, considerations around priorities in implementation modules, training plans, vendor staff training vs. train-the-trainer model (possible combination), and thresholds of levels of attainment participants should reach to demonstrate proficiency.

WPS's existing Student Information System will continue to be used during the implementation of the proposed SIS Software System solution.

The proposed Student Information System must be implemented, fully operational, and used by all school and departmental personnel and all WPS employees for the 2021-22 school year. This will require that implementation is completed by December of 2021. The SIS implementation includes the ingestion of all desired student data for the purposes of testing all operational modules of the proposed SIS.

Implementation follow-up must continue after the system is functional for six months.

Vendors should refer to Table 1-2: Student Information System Implementation Summary when preparing their detailed Project Plan for the proposal response defined in Section 4.3.1 Project Workplan.

Table 1-2 summarizes a broad overview of a possible Student Information System Implementation

Time Frame	Activity
November 2020 – December 2020	<ul style="list-style-type: none"> • Initial implementation planning • Existing system and data assessment • SIS data transfer planning • Student data import/export planning • Student & staff data import and testing • Project rollout schedule • Training for student registration and scheduling
December 2020 - January 2021	<ul style="list-style-type: none"> • Course, buildings, rooms, teachers, bell times are imported or created in new SIS • Perform unit and systems testing • Data validation and cleanup performed • Continued student registration and scheduling training
February 2021 -	<ul style="list-style-type: none"> • Begin entering of student course requests, building of master schedules, and student scheduling
April 2021 – July 2021	<ul style="list-style-type: none"> • Perform unit and systems testing • Configuration and testing of all MA DESE reporting • Configuration and testing of interfaces between all external systems and proposed SIS • Student Information System training – Grading, Attendance and related modules
August 2021	<ul style="list-style-type: none"> • Go live with proposed Student Information system • Report generation training for all applications • Follow-up training • Changes in configurations as necessary to fine tune the proposed SIS

2.0 BACKGROUND

2.1 Introduction

This section begins with background information on the WPS, the organizational structure, and the educational services provided by the various programs and schools. In addition, information provided is focused on the overall expectations for the Student Information System, as well as the WPS's specific needs. It also describes existing services, issues, and infrastructure that the WPS expects the Proposer to address and incorporate into their solution. Additionally, included are some of the issues that need to be considered when migrating from the WPS's current Student Information System to the proposed system.

2.2 Worcester Public Schools

"The Heart of the Commonwealth" and the second largest city in New England, Worcester, or "The City of Seven Hills," not only is centrally located in the state but also serves as a commercial, industrial, and cultural center. This culturally diverse city serves over 25,000 students in grades PreK through 12.

Worcester Public Schools Vision:

Ensuring all students receive a superior 21st century education.

Worcester Public Schools Mission:

Worcester Public Schools will ignite a passion for learning by providing a challenging, creative curriculum in a safe, supportive environment where students reach their highest potential.

2.2.1 General Information about the Worcester Public Schools

The Worcester School Committee is the legislative and policy-making body charged with supervision of the Worcester Public School System. It "shall have the power to select and to terminate the superintendent, shall review and approve budgets for public education in the WPS and shall establish educational goals and policies for the schools in the WPS consistent with the requirements of law and statewide goals and standards established by the Massachusetts Board of Education."

The School Committee consists of the mayor of the City of Worcester and six elected officials responsible for the adoption of policies that govern the operation of WPS public schools. The Superintendent of Schools is responsible for the administration and management of the schools within the applicable parameters of State Laws, State Board of Education Rules, and School Committee policies.

2.2.2 Worcester Public Schools Demographics

WPS is the 4th largest school system in Massachusetts. The WPS is composed of 34 elementary schools, 4 middle/junior schools, and 7 secondary schools.

2.3 Current SIS Operations

The WPS performs a number of functions related to student information through a variety of applications as described in Appendix C – Current Technical Applications Environment.

Appendix C lists in detail the current SIS environment including all the inter-relationships among the other Department applications that draw information from or send information to the SIS system. The proposed system needs to meet and exceed the current Student Information systems operations. The WPS expects the proposed solution to provide the required ability to interface with these external systems or provide functionality to replace them where appropriate.

2.4 Current/Future Network Architecture Environment

The successful respondent will provide a Student Information System (SIS) solution that fits the Worcester Public Schools' current and future network environment.

- Internet connectivity is centralized and split between to 5Gbps fiber optic connections to our ISP.
- The WAN is a hub and spoke topology with 10Gbps fiber optic connections linking the HUB Network Operations Center (NOC) to the SPOKES, Department schools and administration buildings.
- All schools (spokes) have a 10Gps LAN backbone. Desktop computers are connected to the LAN via 1Gbps CAT5, CAT5e, or CAT6 ethernet utp.
- All schools have full coverage of 802.11g/n or 802.11 a/b/g/n/ac wireless. All schools should have full WiFi 6 coverage by 2027.
- The WPS utilizes a combination of Windows Desktop PCs, Chromebooks, and iPads for end users.
- The WPS desktop computers use Microsoft Windows 10 OS.
- The WPS desktop computers are loaded with IE11 and Chrome Version 83.0.4103.116 as a minimum.
- WPS internal applications and services are hosted at two WPS datacenters. Services are primarily provided utilizing VMWare ESX Clusters on Dell/EMC storage and compute resources. Each datacenter provides redundancy for the other.

2.5 Information Technology (IT) Department

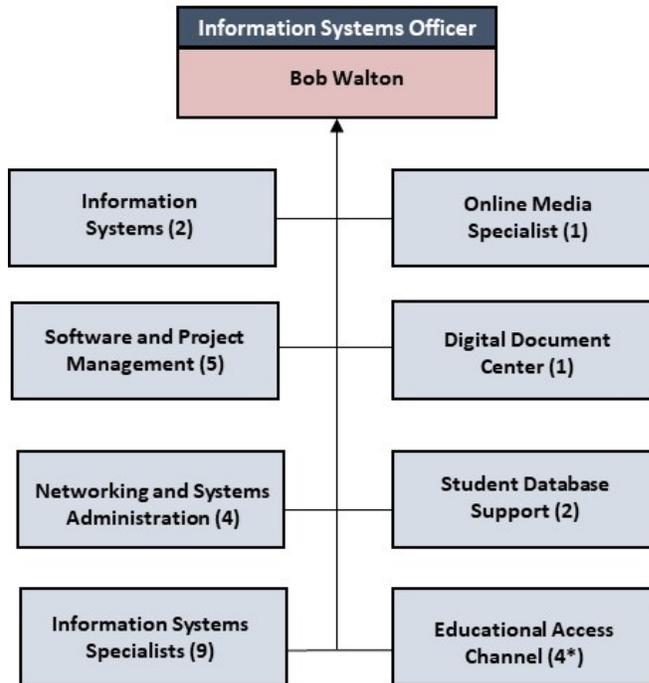
The Information Technology Department provides information, solutions, and support services to the Worcester Public Schools. Its vision is to perform as the industry leader in technology, information, and innovation. Its mission is to leverage technology and information to support superior learning opportunities.

Led by Information Systems Officer, Robert Walton, IT is divided into several teams. These teams are:

- Information Systems (2)
- Software and Project Management (5)
- Networking and Systems Administration (4)
- Information Systems Specialists (9)
- Online Media Specialist (1)
- Digital Document Center (1)
- Student Database Support (2)
- Educational Access Channel (4)

Figure 2-1. Information Technology Organizational Chart

Information Technology Organizational Chart



* Indicates Grant or Other Non-General Fund Sources

2.6 Current WPS Technology Standards and Interoperability Framework

Preferred standards can be found in the chart below:

WPS Technology Standards	
Server	
Operating System	Microsoft Windows Server 2019
Virtual Platform	VMware
Database	
Software	Microsoft SQL Server 2019 – Enterprise
Desktop / Laptop Computer	
Hardware	Dell Optiplex desktops, Macbooks
Operating System	Microsoft Windows 10 [64-bit], OS X10.15
Browser	Google Chrome, Safari, Firefox, Edge
Tablet Computer	

Hardware	IPad
Operating System	iOS
Browser	Safari, Google Chrome,
Smartphone / Smart Device	
Operating System	iPhone iOS 13
Office Apps / Messaging	
Email	G Suite Education, GMail
Instant Messaging	Google Hangouts
Collaboration	
Software	Google Drive
	Google Classroom
	Google Groups
Miscellaneous	
Authentication	Microsoft Active Directory synced with G Suite for Google
Data loads	Clever

2.7 Student Information System Vision

The School Committee’s vision for the new SIS Information System is to provide access to accurate, timely, and meaningful student data for all stakeholders (students, parents, staff, and community) for the purpose of enhancing student achievement and creating life-long learners. Access to complete and consolidated information will support data driven decisions at all levels of the organization. Access to the information in the system will be extended to the following, based on the WPS’s security access standards:

- WPS administrators, supervisors, staff, and WPS research department.
- WPS school site administrators, staff, including but not limited to, principals, assistant principals, counselors, specialists, and clerical support staff.
- Entire teaching staff.
- Parents and students in the Worcester Public Schools.
- Community agencies and organizations as appropriate.

3.0 GENERAL REQUIREMENTS

3.1 General Project Requirements

The primary goal of this project is to replace the current Student Information System. The proposed system will support the Student Information needs of all WPS employees, parents, and students with an integrated, enterprise, vendor-hosted system. The proposed system will be configured around an enterprise relational database with the capacity to support the WPS's needs for the foreseeable future (ten years minimum). A key focus of the proposed system is its flexibility to meet current and future needs of the WPS without the need for vendor custom programming.

- The proposed Student Information System must address the broad needs detailed in the functional requirements specifications detailed in Appendix A – Student Information System Functional Requirements Response Forms.
- The proposed Student Information System must interface with the external systems. These interfaces are to include data imports to refresh data from external systems and export statistical and/or Student Information System transaction data to other WPS systems.
- Training and professional development will be provided by the selected vendor to the WPS and school-based level staff to ensure the timely implementation and effective use of the proposed system.
- There must be a method for providing timely user and technical support.
- Selection of the proposed Student Information System will consider not only purchase price, but also life-cycle costs associated with maintenance, support, and training as well as being the best system for the WPS.
- Ease of use — By incorporating an easy-to-use user interface (including graphics, speech, animation, and video as they evolve), the system must enable users to solve many problems themselves.
- Reliability/Availability — The system must minimize hardware and software failure so people will have the confidence to rely on it. Backup/Restore functions must not interrupt SIS users.
- Maintainability — When problems occur or software upgrades are needed, support must be available from a central location. Student Information System software upgrades must require little or no down time.
- Supportability — To coordinate support when assistance is necessary, support staff must have access to information regarding all previously reported problems and their solutions.

3.2 System Scalability and Performance

The Student Information System must be scalable and able to process concurrent user transactions within acceptable industry response times for similar types of transactions. Response time is defined as the interval from the time a user sends a transaction to the time a visual confirmation of the transaction completion is received. The response times below are to be met under normal workload conditions, including peak periods where most WPS offices and schools are performing similar functions within the same short time period.

As a condition of the WPS's acceptance testing procedure, response time for the proposed Student Information System will be tested and measured and/or overseen by WPS technical staff.

The system will be deemed satisfactory and acceptable if the following minimum response time criteria have been met in addition to the User Acceptance Testing criteria included in subsection 4.9:

- Unique transactions that the Student Information System is capable of performing must exhibit 5-second or less response time with the equivalent of a T1 data connection. The Student Information System itself should be able to generate a basic web page within 1 to 3 seconds, given the specified load.
- A database query could take up to five (5) seconds. The vendor will be expected to guarantee performance of their solution.
- The field to field on-screen data entry response time will be less than .5 seconds.
- Specific exceptions will be made for complex functions such as generating a complex search. For any specific functions that inherently require longer response times than the range above, the Proposer must itemize these functions and state the anticipated response times (with accompanying reasons) in the Proposer's submittal.
- Any other conditions or exceptions to the metrics stated in the above paragraphs must be identified by the Proposer in the Proposal. These response time requirements are intended to insure application usability and acceptable performance from a user's perspective.

3.3 Data Query and Reporting Framework

The Student Information System reporting and query capabilities should allow for a wide variety of report types including summary, detail, forms, and drill down, as well as allowing for fast and easy report creation using report wizards that easily integrate with Microsoft Office products and other third party applications, such as Microsoft SQL Server Reporting Services (SSRS). The WPS's standard is Microsoft SQL Server 2019 - Enterprise for administrative users.

3.4 System Requirements

The Proposer must provide a detailed explanation of how its solutions will effectively address each requirement stated as a Student Information System RFP, and will provide a detailed explanation of how its solutions will effectively perform all aspects of the scope of services identified in the RFP. At a minimum, the detailed explanation by the Proposer will identify and discuss the following:

- The Proposer will identify the required software and related costs to the WPS that may be required to operate under a vendor-hosted solution.
- The Proposer will identify which items of required hardware and equipment it will provide and at what cost to the School Committee. The Proposer will identify other sources for such hardware and equipment, if any are available.
- The Proposer will identify in detail all software necessary to operate the system in accordance with the above-stated requirements. With respect to each item of software, the Proposer will identify whether the software is already tested, working, and operable, or whether the software is still under development. If it is still under development, the Proposer must identify the stage of development, personnel working on the development, and describe the schedule for completion.

4.0 PROPOSAL SUMMARY AND PROPOSAL ORGANIZATION

4.1 Introduction

This section contains instructions to Proposers on how to prepare their written responses to this RFP. As Proposers prepare their responses, they should be guided by the **Table of Contents in Section 7: RFP Response Format and Contents**. Proposers must factor into their written response the information presented in Section 2, Background; Section 3, General Requirements; Appendix A, Student Information System Functional Requirements, and requirements specified in this section (Section 4).

4.1.1 Proposer's Responsibility

A respondent, by submitting a Proposal, represents that:

- A. The respondent understands the RFP in its entirety and that the Proposal is made in accordance therewith.
- B. The respondent possesses the capabilities, resources, and personnel necessary to provide efficient and successful service to the WPS.
- C. Before submitting a Proposal, each respondent shall make all investigations and examinations necessary to ascertain site and/or local conditions and requirements affecting the full performance of the contract and to verify any statements made by the WPS. If the respondent receives an award because of its Proposal submission, failure to have made such investigations and examinations will in no way relieve the respondent from its obligations to comply in every detail with all provisions and requirements of the contract, nor will a plea of ignorance of such conditions and requirements be accepted as a basis for any claim by the respondent for additional compensation or relief.

4.1.2 Licenses and Certificates

- A. The WPS reserves the right to require proof that the respondent is an established business and is abiding by the ordinances, regulation, and the laws of the State of Massachusetts, such as but not limited to: current registration with the Secretary of the Commonwealth as an authorized business in Massachusetts, Business Tax Receipts, business licenses, Massachusetts sales tax registration, and Federal Employers Identification Number.
- B. Each firm and personnel who will be performing services on behalf of the firm for the Board are to be properly licensed to do business in its area of expertise in the State of Massachusetts. Each firm shall submit a copy with their Proposal and maintain the appropriate licenses and certificates during

the term of the contract and any extensions. Failure to maintain these requirements shall be cause for immediate termination of the contract.

4.2 Firm Qualifications Requirements

The purpose of this section is to provide the WPS with the ability to verify the experience and knowledge claims made in the Proposal by the Proposer and to assess the Proposer's prior record in providing services to other organizations. If the vendor's Proposal involves the use of any subcontractor, where the subcontractor's project involvement exceeds ten percent (10%) of the Proposal Total Cost amount, the subcontractor must also comply with the Proposer qualifications requirements identified in the following sections:

4.2.1 Firm History and Background

4.2.2 Firm Required Financial Information

4.2.3 Customer References

4.2.4 Project Team Organization Chart/Structure

4.2.5 Project Team Staffing and Qualifications

Proposers are advised that the information and responses to this section will assist the WPS in determining the vendor's financial viability and its commitment to the proposed Student Information System.

4.2.1 Firm History and Background

Please describe the Proposer's corporate background and experience. Specifically address your corporate history and experience in developing, installing, and supporting Student Information System software for school systems whose needs and size are comparable to those of Worcester Public Schools. The WPS is particularly interested in your experiences and success in the state of Massachusetts.

The Proposer must provide the following information:

- General information about the Proposer's organization.
- Identification whether the firm is the prime Proposer or subcontractor on this project.
- Date established.
- Corporate office location.
- Licenses & certifications.
- Documentation from the appropriate state's agency confirming firm's legal entity type (i.e. sole proprietorship, partnership, limited liability partnership, corporation, limited liability corporation, etc.) For non-Massachusetts businesses, submit documentation from the state in

which the business was formed and documentation from the Secretary of the Commonwealth of Massachusetts providing authorization to perform business in Massachusetts.

- Federal Identification Number of firm.
- Ownership interests.
- Active Business venues (counties, states, etc.).
- Present status and projected direction of business.
- Number of technical and service staff available to support installation, training, documentation, and maintenance efforts.
- Number of technical staff devoted to proposed product development and/or enhancements to current Student Information System products.

4.2.2 Firm Required Financial Information

The Proposer must provide the following financial information:

- Dun & Bradstreet number and report, if available.
- Annual Report for the last year.
- Audited Statements of Income and Retained Earnings for the last three fiscal years.
- Statement of Changes in Financial Position for the last two years, as applicable.
- Balance Sheet for the last two fiscal years.
- Opinions concerning financial statements from a Certified Public Accountant for the last two years, as applicable.
- The Proposer must identify each lawsuit against the Proposer, or any affiliate, subsidiary, sister corporation, holding company, or owner of an interest of 10% or more in the Proposer, and against the manager (in the case of a limited liability company), chief executive officer or president, treasurer, any executive vice president or the corporate secretary during the ten-year term immediately preceding the date on which the Proposal is submitted. For each lawsuit identified, please explain the nature of the lawsuit and how it was resolved. If it is still pending, please identify whether or not a trial date has been set. Also, identify where the lawsuit is pending and in which court. For purposes of this section, the term "lawsuit" means any action filed in a state court, a federal court, and any administrative agency litigation and arbitration.

4.2.3 Customer References

The WPS is looking for the Proposer to demonstrate its experience with school systems comparable in size to Worcester Public Schools. Please provide at least three (3) school system references for the SIS where the current software release is fully implemented with a full suite of Student Information System modules for approximately 25,000 students or more. For Proposers submitting with a consortium of companies, provide at least three (3) references for each company. Do not provide references for school systems using a product other than the one you are proposing.

The customer references submitted must be recent, whereby the Proposer must have implemented the respective system within the last Five (5) years. The customer references must be school systems whose business processes and data needs are similar to, or exceed those performed by, the WPS in terms of functionality, complexity, and transaction volume.

Specifically, the referenced customer/project will be considered comparable if they contain the following minimum attributes:

- A school system with a recent version of the proposed Student Information System software installed and fully operational with a full suite of modules and supporting an enrollment of 25,000 or more students.
- For each reference, the Proposer shall provide the following information:

School System:	
Number of students within the system:	
School System Address: (city, state, & zip)	
Contact Name: (employee most familiar with the project)	
Title of person listed above:	
Contact telephone number:	
Contact email address:	
Date Implementation Project Started:	
Date Implementation Project Completed:	
List of Products Installed and Operational: (include version #)	

Please provide a list of all school systems for the past 10 years that you have done business with (both past and present customers).

For the proposed Student Information System product, please list the number of school system customers the Proposer has in Massachusetts as well as the number of school systems in other states indicating with an asterisk (*) those Systems over 25,000 students enrolled.

The WPS reserves the right to contact other known vendor clients beyond those submitted as references.

Department-Provided Project Resources

In the following section, please discuss your firm’s proposed Project Organization and Project Staffing. To assist the Proposer with its response, please refer to Table 4-1 WPS-Provided Project Resources. The WPS technical resources will be available throughout the course of the Student Information System implementation.

Table 4-1: WPS-Provided Project Resources

Project Team Role	Number	%	Comment
Project Sponsor	Two (2)	5%	Duration of project
Senior Data Analyst	One (1)	10%	Duration of project
Secondary Schools Coordinator	One (1)	5%	Duration of project
Elementary Schools Coordinator	One (1)	5%	Duration of project
Developers	Two (2)	10%*	Duration of project
Systems Administrator	One (1)	10%*	Duration of project
Content Experts/Student Information System Trainers	Two (2)	25%*	Student Information System Experts, Training, Testing

*As needed

4.2.4 Project Team Organization Chart/Structure

Within the Proposal, the Proposer must provide an organizational chart of their proposed project team. The organization chart should include the Proposer’s and **WPS-provided resources** as defined in Table 4-1 to provide the WPS with an understanding as to how the Proposer envisions utilizing its and the WPS’s resources.

4.2.5 Project Team Staffing

Within the Proposal, the Proposer must define the roles and responsibilities of each of its assigned staff. In addition, please provide complete resumes of each staff member. Resumes should include work history related to Student Information System installation assignments. If the Proposer's solution involves use of subcontractors in an amount greater than 10% of the project's budget, the response must include resumes of any subcontractors.

4.3 Project Management Approach Requirements

Please describe your firm's Project Management Approach used to manage the design, configuration, and implementation of the proposed Student Information System. The project management components that the Proposer is responsible for include, but are not limited to, project work plans, project deliverables, schedules and budgets, risk management, change management, issue management, and quality management. Please address the following topics in your approach to Project Management.

4.3.1 Project Workplan

The Proposer will be responsible for the development and maintenance of a detailed work breakdown structure that must include, but is not limited to, the identification and definition of all project phases, stages, and tasks and the respective start dates, duration of tasks, dependencies of tasks, milestones, deliverable due dates, and responsible party (e.g., Student Information System Software Vendor and WPS personnel).

Within the Proposal, the Proposer must provide its proposed project workplan, preferably in Microsoft Project. The project workplan must identify all proposed tasks associated with the stages described in the **Background to the Preparation of the Project Work Plan** that follows. Please refer to the WPS's proposed schedule in Section 1.24 "Student Information System Implementation Requirements" for the WPS's general timeframe for Student Information System implementation.

The project workplan must also include:

- Critical Path
- Task dependencies
- Project milestones and deliverables
- Task Owners by Organization (including tasks involving the Proposer and WPS and third-party Vendors)

The Proposer's project workplan must identify tasks where the **WPS's subject matter and technical staff** will be working independently or collaboratively with the Proposer staff during the design, development, configuration, and implementation phases of the Student Information System solution.

The WPS requests that the Proposer include the funds to support a minimum of 3 days for face-to-face/virtual project planning at key milestones throughout implementation identified in the Work Plan and budgeted for in the Appendix B: Cost Forms

Background to the Preparation of the Project Work Plan

The WPS requests that the Proposer address the following general project tasks in its work plan.

- Plan the overall Student Information System implementation schedules with assistance from the WPS (see Table 4.1 WPS-Provided Project Resources above).
- Install the Student Information System software supplied as part of its Proposal and train WPS level technical staff during the initial testing of the proposed system.
- Customize Student Information System product to support the WPS's business and operational requirements.
- Lead the WPS personnel with assessing current business practices to maximize the potential of new opportunities provided by a more contemporary solution with a focus on reducing manual data entry, streamlining SIS processes to provide accuracy, and ensuring more accurate data collection.
- Convert the WPS's current Student Information System data.
- Integrate into the Student Information System periodic and annual reporting data elements required to support the state and federal reporting needs.
- Assume the overall project responsibility to develop the Student Information System interfaces to external systems as listed in Section 2.3 above.
- Test and provide a report to validate and verify that all Student Information System modules and functions meet the vendor's acknowledged specifications as listed in Appendix A of the Proposer's submittal and prove that all Student Information System modules operate properly.
- Manage the rollout of the Student Information System and associated hardware, if required.
- Conduct the training for all required staff on the configuration, system management, and operational use the Student Information System.
- Address the most optimum and practical methods of supporting both business continuation and disaster recovery.

The Proposer should address all these tasks in their Project Management Plans.

4.3.2 Workplan Management Approach

Within the Proposal, the Proposer must describe the proposed approach to effectively managing the project workplan. At a minimum, the Proposer must describe the method for ensuring timely updates to the workplan, the approach for managing and communicating to the WPS changes, and the approach for tracking baseline versus actual or the methods and procedures employed in other WPS implementations.

4.3.3 Risk Management Approach

Within the Proposal, please describe your proposed approach to risk management. At a minimum, the Proposer must describe its approach to risk identification, risk analysis, risk response development, risk monitoring and control, or the methods employed in other Department implementations.

4.3.4 Change Management Approach

Within the Proposal, please describe your proposed approach to change management. At a minimum, the Proposer must describe the change control system to be used and its approach to change identification, impact evaluation, change authorization, and change implementation or the methods employed in other Department implementations.

4.3.5 Issues/Resolutions Management Approach

Within the Proposal, please describe your proposed approach to issues management. At a minimum, the Proposer must describe the issue management control system to be used and its approach to issue identification, impact evaluation, issue assignment, and issue resolution or the methods employed in other Department implementations.

4.3.6 Quality Assurance Management Approach

Within the Proposal, please describe your proposed approach to quality management. At a minimum, the Proposer must describe its approach to quality planning, quality assurance, and quality control or the methods employed in other Department implementations.

4.3.7 Knowledge Transfer Strategy

Within the Proposal, please describe your proposed approach to performing knowledge transfer to WPS staff.

4.3.8 Communications Plan

Within the Proposal, please describe your proposed approach for the creation of a communications plan in particular, the communication of timelines to affected stakeholders including all users of the new SIS.

4.4 Proposed Technical Environment

In response to this section, please provide an overview of the technical environment required to support the proposed cloud-based Student Information System. This technical environment includes data center specifications, back-up schedule and strategy, security measures, and technical approaches to addressing the major areas of functionality that are to be provided within the Student Information System. High-level diagrams showing major system components, their interrelationships, and supporting diagrams and materials should be included to provide the WPS with a visual, as well as narrative, representation of the future operating environment.

The Student Information System must reside in a secure external data center. In the Proposal, the Proposer must identify and provide detailed information concerning the following issues related to hosting, backup, and alternatives for hosting, backup of data, and WPS access to its data:

- A. It is essential that the WPS have immediate access electronically to all its data. It is also essential that the proposed system have an adequate provision for backup of data and accessibility to data.
- B. If the hosting system or backup fails for any reason, then the vendor, at its expense, if awarded the contract, will be bound to restore the data to the level and in the format in which it was delivered by the WPS to the vendor.

4.4.1 Description of Vendor Hosted Environment

Within the Proposal, please provide a diagram and a description of the proposed vendor hosted environment that will integrate with WPS's Intranet and Internet environments as summarized in Section 2.4. Please address the following areas:

- hardware platform
- operating system
- database
- web application development
- report writers
- data modeling tools

The Proposer must identify where the system will be hosted, the equipment for the hosting, ownership of the server, or other means by which the system will be hosted.

4.4.2 Department Network Infrastructure Requirements

Within the Proposal, please provide a description of the proposed network infrastructure that is required by the WPS to obtain acceptable performance levels using the proposed cloud-based Student Information System. The proposed solution must be capable of operating in the WPS's Intranet and Internet environments as specified in Section 3. Please discuss any concerns the vendor has regarding the Student Information System application response times summarized in Section 3.

4.4.3 Database Structure

Within the Proposal, please describe the proposed Database Management System (DBMS) and high-level database structure to be used in the proposed Student Information System environment. Provide a schematic illustrating the interfaces and interworking relationships among the Student Information modules or applications. **Clearly identify all the database instances required to support the entire WPS. That would include any database instances required for internal testing/development and employee training.**

4.4.4 Back-up

The Proposer must identify the specific means by which data will be backed up and the schedule for backup.

4.4.5 Department Data Access

The Proposer must identify how the WPS may access (read-only) and/or download its data, and it will identify all conditions for such access and obtaining of data by the WPS. The proposer must also identify how the WPS may request its data, as well as the maximum amount of time that the WPS may be required to wait before it will receive requested data.

4.4.6 Single Sign-on

The WPS is expecting a single user sign-on system. Log-in availability will be provided by the WPS Active Directory System and role-based rights managed within the proposed Student Information System. Please explain how your SIS supports and/or integrates with an existing single-sign-on strategy used by the WPS.

4.4.7 3rd Party Applications

Please describe any proposed 3rd party applications/components that will be included in the Student Information System proposal, including public domain applications (if any), commercial off-the-shelf (COTS) application(s) (as applicable), and standard and ad hoc reporting applications. For each application, please identify the vendor, version, and integration strategy for the product.

4.5 Proposed Solution Approach

Describe the overall functionality of the proposed solution.

The Proposer's Student Information System solution must provide functionality that fully supports but is not limited to the major processes discussed in Section 2 "Background," and Section 4.4 "Proposed Technical Environment."

- Approach to meeting Student Information System requirements as delineated in Appendix A.
- Approach to interfacing with other WPS mission-critical applications.
- WPS, Massachusetts DESE, and Federal Reporting.

The proposed solution must provide a single interface to perform all functionality being delivered by the vendor for the proposed solution whether the function is being served by the Proposer's software, public domain software, or a third-party tool or software product.

4.5.1 Approach to Meeting SIS Requirements

With regard to Appendix A, if the Proposer's Student Information System product cannot meet specific application functional requirements specified (coded "No"), then the Proposer should describe how they would extend their Student Information System product to meet those requirements. The proposer is asked to estimate the cost of these product enhancements using Appendix B - Student Information System Total Cost Summary Forms, Tab 2: Student Information System Installation Services.

4.5.2 Approach to Interfacing with Other Department Mission-critical Applications

Within the proposal, please describe your approach to interfacing with the other WPS mission-critical applications. WPS wants vendors to address the following issues or points.

- Provide a list of vendor-supported protocols such as ODBC, FSTP, etc.
- Provide a list of vendor-supported connection interfaces such as SFTP, JDBC, Oracle ODI, Oracle Fusion Middleware, IBM WebSphere, LDAP, CSV and tab-separated flat file readers.

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- The WPS will consume data from outside sources using a variety of methods. Describe the vendor's capability to process the three methods:
 - scheduled
 - manually invoked (bulk)
 - simple monitoring that invokes the process when new data files appear (event-driven)
- Describe the vendor's capability to notify the WPS of failure as the result of the above data consumption process from outside sources.
- Describe the vendor's support for the following four types of data transfer, deploying each for the data integration tasks for which it is the most appropriate solution. Include a list of protocols supported for each type of data transfer.
 - Remote invocation of application programming interfaces (APIs), Web services, and SOA adapters.
 - File transfer using a variety of formats. Please provide a list of supported formats.
 - Publish and subscribe transfers through a messaging middleware broker.
 - Secured direct access to the database only by IT staff, based upon role.
- Describe the vendor's ability for creating and retaining data import logs that capture routine process and error related information including retention protocols.
- Describe the vendor's ability for authorized users to securely export selected or all data elements to standard file formats with configurable field length & type and explain your mechanism for export and include the list export protocols.
- Describe the vendor's capability and methods to transfer permanent records or transcripts via industry standard methods.
- Describe the vendor's ability to directly interface with any WPS document imaging system. How would the SIS be interfaced with the WPS document imaging system? Are customizations required to store and retrieve documents? How are document keys defined and stored?

- Describe the vendor’s ability to manage bi-directional student data transfer formats with the State system including but not limited to student identifiers. If a student cannot be matched in the system, are errors produced? How are the errors surfaced to the system?
- Describe the vendor’s ability to import into the SIS for data reporting purposes in an automatic basis.

Please refer to Appendix C: Current Technical Applications Environment for file layouts and data element formats and describe how the proposer plans to seamlessly exchange data with other WPS systems.

4.5.3 Approach to WPS and Massachusetts DESE Reporting

Within the proposal, please discuss how the Proposer intends to meet the Massachusetts Department of Elementary and Secondary Education (MA DESE) reporting requirements as defined on the MA DESE web site. This includes the method the WPS will utilize to access and report data.

Details for MA State Reporting are under the Information Technology section.

Massachusetts K-12 State Reporting Requirements

The proposed system must have the ability to meet the rigorous state reporting requirements.

The MA DESE main web site is:

<http://www.doe.mass.edu/infoservices/data/schedule.html>

Details for MA DESE State Reporting are found under the Information Services section:

<http://www.doe.mass.edu/infoservices/>

The database manuals and technical assistance papers that define the requirements can be found at:

<http://www.doe.mass.edu/infoservices/data/sims/>

In addition, please discuss the Proposer’s program for maintaining its compliance with changes to Massachusetts DESE reporting requirements going forward.

4.6 SIS System Integration

Within the Proposal, please describe your firm’s approach to lead and facilitate the process to interface the Proposer’s Student Information System with the other WPS mission-critical applications. These applications and respective interface requirements are listed in Appendix C – Current Technical Applications Environment. Provide a completed Appendix C and explain how the Proposer plans to ensure seamless and automated data exchange across these systems.

Of particular note, the City of Worcester maintains an accurate list of all street names and addresses within the city jurisdiction in a Master Address Repository (MAR). The MAR is a

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Federal Geographic Data Committee (FGDC) standards compliant database that is updated using spatially enabled maintenance tools, and is the single source used across the City organization for street name and address validation

The Student Information System shall use the MAR for student address validation and store the MAR unique ID as a pointer to the MAR for future required address or street name updates. Integration with the MAR can be accomplished by either using address points stored in GIS or by using the provided standard MAR Web Services. For detailed information about the MAR Web Services and how to use them, refer to Attachment A - MAR API RFP Documentation. This includes the information required by WPS to import information from the city of Worcester MAR GIS street address database into the Student Information System.

4.6.1 Required 3rd Party Data Exchange Integrations

The Proposer is required to review all the WPS 3rd party applications data interfaces found in Appendix C: Current Technical Applications Environment.

Following review of the required interfaces, explain the process and methodology the proposer will use to evaluate the current data file interfaces. The Proposer is required to discuss and/or describe their process for building interfaces not in existence to satisfy required data exchanges

4.6.2 Data Exchange Protocol

The Proposer will discuss/describe their current data tools used to prepare data for:

- extraction
- transformation
- loading

4.6.3 Manage the Data Exchange Process

The Proposer will be required to manage and lead the data exchange process that includes, but is not limited to, the following activities:

- Review existing data exports to/from external systems.
- Recommend enhancements and/or improved data exchange strategies based on business process improvement recommendations resulting from the activities outlined in section 4.7.
- Provide WPS staff with templates and/or tools to assist with planning for new or existing data exchanges.
- Support WPS staff with data exchange efforts.
- Work with WPS staff to implement and test data exchange protocols.

Describe the strategies that will be used by the proposer to manage and lead the data exchange process through to completion.

4.7 SIS Business Process Improvement

As part of the proposal response and in essay and flow chart format, please describe your firm's approach to lead and facilitate several Student Information System related process improvements that could be used by WPS. Also describe how your firm works with WPS staff to analyze process improvements, implement process improvements, and document process improvements. Proposed process improvements must focus on eliminating waste, reducing time, improving quality and effectiveness, and promoting continuous improvement.

WPS has identified four (4) process improvement areas listed below as part of the Student Information System. The selected Vendor may propose additional areas of process improvement for evaluation prior to or during the initial implementation work. Any changes to the agreed upon SIS Business Process Improvement areas will require a signed decision by the WPS Sponsor and the Vendor Project Manager.

The WPS Project Manager will assign subject matter experts to support the business process improvement work. The Vendor will work collaboratively with the assigned staff to provide leadership and guidance as part of the business process improvement work.

Describe in narrative and flow-chart how the proposed solution will support each of the process improvement areas stated below.

4.7.1 Student Attendance and Engagement

The move to remote instruction due to the COVID-19 virus has required school systems to rethink the notion of attendance and develop new strategies to document student engagement and class participation. Describe features and/or functionality required to support these new student attendance and/or engagement tracking strategies.

4.7.2 Student Registration

Again, COVID-19 is requiring school systems to provide both the ability to register new and re-register existing students in multiple formats, including online and face-to-face. Describe how your solution supports both formats with a workflow that ensures data is processed in a timely fashion, checked for accuracy by WPS staff for acceptance into the system, and reduces entry of redundant data especially for the re-registration process.

4.7.3 Predictive Analytics and Alerts

Describe how your company and current clients have used "predictive analytics" generated using SIS data to make informed learner centered discussions. Also. Describe 2-3 alerts generated by your SIS solution for EACH of the following roles:

- School Principal
- Guidance Counsellor
- Response to Intervention (RtI) Team
- Special Education
- Teacher
- Parent/Student

4.7.4 Data Access, Dashboards, and Reporting

Describe your organization’s ability to provide “digital dashboards” focused on supporting WPS’ vision, mission, and goals as well as school improvement plans at each of the schools. Describe your firms’ approach to provide useful reports using SIS data and data from other Administrative Applications. In addition, provide research based best practices for helping school level staff make data more accessible and useful.

4.8 Proposed Approach to Enhancements and Customizations

In order to satisfy the technical and business requirements identified throughout this RFP, as well as the Student Information System specifications outlined in Appendix A, the Proposer may be required to make customizations to the Student Information System product (for example, software features developed specifically for the state of Massachusetts that are not currently contained in your product). The WPS asks the Proposer to explain its approach for prioritizing and developing software package extensions or customizations.

4.8.1 Approach to Enhancing SIS Software

Within the Proposal, please describe the Proposer’s system design and development approach for making enhancements to the Student Information System software. Explain the tools used to develop the product. Explain what role the Proposer’s client base has in the product enhancement process.

4.8.2 Software Customizations for the School Department

Within the Proposal, please describe your proposed approach for determining and developing customizations to the Student Information System software to meet any WPS specifications that are currently unmet by the Proposer’s Student Information System product.

4.9 Testing Strategy

The WPS expects the Proposer to validate that the customizations and configurations made to its Student Information System will operate properly in the WPS’s technical and business environments prior to going-live. The Proposer is responsible for transparently establishing all appropriate testing environments to support Student Information System testing activities. In order to ensure that each component of the Student Information System has been adequately tested prior to go-live, the Proposer is responsible for performing and/or

overseeing the following minimum levels of testing: Unit Testing, Systems and Integration Testing, and User Acceptance Testing. These testing levels are described below:

- **Unit Testing:** Unit Testing is performed by an application developer or tester on an individual software module or component in the development environment. During Unit Testing, the developer or tester must test all unit logic paths and conditions for accuracy, efficiency, and conformance to the respective requirements.
- **Systems and Integration Testing:** Systems and Integration Testing is testing the integration of the individual modules within a subsystem, subsystems within a system, and the components of the overall Student Information System. In addition, performance and stress testing of the Student Information System application and related network must be conducted. Systems and Integration Testing must be conducted in the Test Environment. Performance and stress testing must be conducted in the Test Environment and Production Environment. In addition to the Proposer, a minimum of three (3) WPS staff will also be performing Systems and Integration Testing.
- **User Acceptance Testing:** User Acceptance Testing provides end-users the ability to test the proposed system. Testing at selected WPS departments including central administration, schools, athletics, health, child nutrition, and transportation may serve as User Acceptance Testing for WPS modules. School-based User Acceptance Testing must also be scheduled for all school modules.

The Proposer is responsible for testing and validating the successful installation and operation of all third-party software that the Proposer provides as part of the solution.

System Acceptance is outlined in section 8.4 under Terms and Conditions. System Acceptance follows “Conditional Acceptance” that occurs prior to go-live and may include a period of time that involves parallel processing on both the old and new systems.

4.9.1 Approach and Description of Testing Strategy

Within the Proposal, please provide an overview of your testing strategy. This must include, but not be limited to, the identification and overall approach to all levels of testing (e.g., unit testing, systems and integration testing, and user acceptance testing), proposed testing environments (e.g., location, hardware requirements, etc.), approach to requirements traceability, and proposed testing participants.

4.9.2 Approach to Testing Documentation

Within the Proposal, please describe your proposed approach for documenting testing components (e.g., test procedures, test cases, test results, etc.).

4.9.3 Approach to Using Testing Tools

Within the Proposal, please identify your proposed testing tools, describe the features provided in the proposed testing tools, and identify the levels of testing that will use the tools.

4.10 SIS Data Conversion Strategy

During the Project Start-up stage, the Proposer will be required to provide an overall Student Information System Data Conversion Plan that will guide the Proposer and the WPS through a structured, orderly, and seamless transition from the existing systems to the proposed Student Information System. The Data Conversion Plan must describe all related tasks, preparatory actions, required resources, time frames, work products, and success criteria for software conversion and data conversion. Software conversion includes the technological transition from the existing system environment to the proposed Student Information System production environment. Data Conversion includes the manual and automated conversion, as appropriate, of existing and historical data to the proposed Student Information System. The Proposer is required to convert all student data and may be required to convert all location master tables, bell schedules, staff data and employee types, and WPS-defined business rules or policies. The Proposer will collaborate with WPS staff to assess the integrity of the data to be migrated to Student Information System. The findings of the assessment need to be addressed in the conversion plan. The WPS expects that all data must pass consistency and audit checks prior to final data conversion into the production environment. Inconsistencies must be documented and resolved prior to the final conversion.

Within the proposal, please provide your proposed Student Information System Data Conversion Strategy. The Data Conversion Strategy must provide information that can be used by the WPS to evaluate the Proposer's knowledge of and intended approach to data conversion. This information must include at least the following.

4.10.1 System Conversion Critical Success Factors

One of the most important activities in any migration to a new or updated system is the need to transfer data accurately to the new or updated system. Please identify the critical success factors for conducting the Student Information System data conversion process.

4.10.2 Approach to Data Conversion

Within the Proposal, the Proposer must describe their proposed approach to data conversion (e.g., timeline, participants, role responsibilities of both Proposer and WPS personnel, contingency for rollback, etc.).

4.10.3 Overview of the Data Conversion Process

To ensure successful implementation, please discuss your approach to conversion of all Student Information Data.

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- Electronic file conversion of legacy Student Information System data.
- Manual data conversion.

What is your plan for developing data extract routines or writing customized program for data conversion if necessary? Under what circumstances is manual data conversion necessary? How are field table files populated within the proposed Student Information System?

The data conversion process consists of a series of tasks to be performed by the Proposer or WPS. Please outline the tasks to complete the conversion process. Explain any data conversion aids the Proposer uses to carry out the conversion work.

4.10.4 Approach to Conversion Documentation

Within the Proposal, the Proposer must describe its proposed approach for performing and documenting system conversion (e.g., procedures, conversion results, etc.). Include examples of data conversion document with the Proposal.

4.11 SIS Support and Maintenance

The Proposer is responsible for maintaining the Student Information System during the term of the Contract, including the vendor software warranty period and ongoing software maintenance through the life of the contract for maintenance with the WPS.

Systems maintenance includes maintaining all Student Information System software components, including managing and tracking the periodic release of application and source code.

The Proposer should discuss its approach to maintaining all version control methods and tools used to control the release of Student Information System software versions and source code. This includes the development and identification of a baseline software version and the tracking and deployment of subsequent software versions. Please discuss how the Proposer ensures that all software upgrades operate with the customizations made by the Proposer during the design, development, and implementation of the Student Information System and any subsequent customizations made by the Proposer post-implementation.

4.11.1 Warranty

The WPS expects that the Proposer's warranty period will commence upon WPS's final acceptance of the system that effectively ensures that the Student Information System functions as it was intended to in a reliable and stable manner. Within the Proposal, please describe the Student Information System warranty, including the warranty period and items covered. The WPS expects a warranty will be provided at no additional cost to the WPS. See section 8.3 Warranty for warranty terms and conditions.

Please address the following points of your Student Information System warranty services including:

- Your proposed warranty services.
- Any exceptions or limitations to your proposed warranty services.
- What is the length of the warranty period?
- What are the hours of warranty coverage (e.g., Mon–Fri 7:30 a.m. to 5:30 p.m. Eastern Time)?

4.11.2 Ongoing SIS Maintenance Program

Within the Proposal, please describe your company’s Student Information System software maintenance program for your proposed solution including the products and services that the maintenance plan covers, the approach to upgrades, and “point releases” of the software.

Please address these points in your response to this section:

- What services are included in your software maintenance program?
- What are the hours of software maintenance coverage (e.g., Mon–Fri 7:30 a.m. to 5:30 p.m. Eastern Time)?
- What is your program for extended hours of telephone support operations? How are these services invoked and at what cost?
- Explain your program for software problem resolution.
- Describe your Procedure for contacting Proposer for maintenance (e.g., Help Desk)
- Explain your Service Level Objectives Response Times (defined as the time elapsed between the placement of the call and the start of remedial maintenance activities by vendor maintenance service personnel).

4.11.3 Ongoing Program for SIS Product Enhancement

Please describe your company’s approach to product development.

- Explain your product development lifecycle, including release planning, release development, release testing, and release rollout.
- Are all product enhancements available to all customers as part of its annual maintenance fees?
- Explain your product enhancement process.
- How are product enhancements determined?

- What role do customers play in the product enhancement process?
- How often are enhancements provided? Explain your company's release schedule.
- Describe the tasks required of the WPS following a new release.
- Describe the installation process for installing new releases of the Student Information System software.

4.11.4 Customer Call Center (Help Desk) Management

As part of the Proposal, please discuss your company's Customer Call Center management.

- Describe how your call center operates.
- List the service hours for contacting the Proposer with problems.
- Explain the role and responsibilities of the WPS and the Proposer.
- What approach do you use to track, report, and manage end user calls for service?
- With what methods can users reach your call center representatives?
- Are all communications with call center representatives logged?
- Describe your Call Center Workflow Process.
- Based upon the urgency of the customer software problem, describe your escalation policies and procedures.
- What guarantees or Service Level Agreements does your company provide for critical support and emergency issues?
- In addition, please present your approach to certifying WPS staff to support its Student Information System locally.

Even when training is delivered close to the go-live date, new end users frequently require personal attention when they use the system for the first time. The Proposer is expected to propose an approach to provide support that accommodates an expected spike in end user assistance and demand on the Help Desk when the system goes live. In addition, the Proposer is expected to propose a method for ensuring that end user concerns and issues raised with Help Desk personnel will serve as input to curriculum content and revising training approaches in a continuous quality improvement feedback loop.

4.12 Security Strategy

Background on Security Architecture

The Student Information System solution must satisfy system security standards as well as state and federal security and privacy policies. System security must be an integral component of the Student Information System design and implementation. The WPS is looking for a Student Information System that provides security down to the data field level.

4.12.1 Security Architecture

Please discuss the proposed Student Information System product security architecture and the security and access structure, including:

- User account structure.
- User account and profile maintenance.
- User group profile and maintenance.
- User and group access security matrix (defining access to application menus and functions).
- Audit reporting of system and application access.

4.12.2 Managing Security

Please describe the Proposer's recommended approach for defining and managing security levels and the capabilities associated with each security level.

WPS requires that security management be centralized, whereby authorized users within the WPS are able to perform some security administration functions (e.g., create and update an individual user's security profile, reset passwords, etc.). If the Proposer's proposed total solution includes use of the Internet, the Security Strategy must also define the Internet access security approach and architecture.

4.13 Training Approach

The WPS recognizes that there are several options that can be deployed to successfully train the WPS staff on the proposed system. The WPS prefers the training to be scheduled "just-in-time" to coincide with the software Proposer's go-live deployment schedule. In addition, WPS wants to ensure the development of training materials/resources for on-going training of new staff throughout the year and ensuing years.

In developing the vendor response to this section, please address the following.

- A training plan for providing for a variety of training strategies to address the needs of all WPS staff members.
- The approach may include a combination of live training, web-based training, and/or web- or media-based courses for staff members to view at their own

pace based upon the optimal or best training practice. Safety guidelines in the fall of 2020 may not allow for face-to-face live training and the vendor must propose alternative virtual options.

- Staffing model for providing training - this will include a statement of the qualifications and experience of the vendor's training personnel.

4.13.1 Training Philosophy

Within the Proposal, please describe your company's training philosophy and experience training administrators, educators, and educational support staff. Include a statement of the qualifications and experience of the vendor's training personnel.

4.13.2 Training Methodology

Within the Proposal, please describe your training methodology and techniques in order to provide the most effective training of WPS and building level staff. Discuss when various training methodologies would be employed including:

- One-on-one training/support (may be conducted virtually)
- Face-to-face workshop training (if a viable option)
- Train-the-trainer approach (may be conducted virtually)
- Webinar training based upon roles/groups
- Embedded online training modules within the application
- "On-demand" multimedia help options (single concept tutorials)

4.13.3 Development of a Training Plan

Please describe the process the vendor will use to develop the Student Information System training plan. The plan should address various:

- Training audiences
- Training topics
- Proposed training materials and tools
- Required training logistics (based upon current conditions)
- Training evaluation procedures, including assessment of required competencies

Proposer shall identify the means of delivery and any limitations in terms of frequency, number of hours, or other impositions on the training that will be provided.

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In addition, Proposer should outline experiences working with WPS personnel on the development of the training plan prior to beginning the project. WPS expects that the proposer will complete and WPS will approve a training outline prior to beginning the Student Information System project.

4.13.4 Vendor SIS Curriculum and Training Modules

The WPS understands that not all personnel need to be trained on all modules of the proposed Student Information System systems. With that in mind, please complete the following tables listing your product's module or subject area training sessions by targeted audiences and module content. Please include the following completed tables in your response to this RFP using the templates in Appendix D.

For each job role in the following table (Table 4-3), please list the subject area modules recommended by job category in the **Training Needs** column and include this table in your Proposal using the templates in Appendix D.

Table 4-3: Summary of SIS End-User Training Requirements by Job Responsibility

Staff Group	Data Responsibilities	Training Needs
Department-level Administrators	<ul style="list-style-type: none"> • View all student data 	<ul style="list-style-type: none"> • (list training modules) • • •
School-level Administrators	<ul style="list-style-type: none"> • View all school-level student data 	<ul style="list-style-type: none"> • (list training modules) • • •
Teachers	<ul style="list-style-type: none"> • View role-based student data • Schedules (view) • Discipline (view) • Attendance (update) • Grades (update) • Special Programs (view) • Demographics (view) • Academic History (view) 	<ul style="list-style-type: none"> • (list training modules) • • •
Clerical Staff	<ul style="list-style-type: none"> • Update all student data 	<ul style="list-style-type: none"> • (list training modules) • • •
Special Education Staff	<ul style="list-style-type: none"> • Schedules (view) • Discipline (view) • Attendance (view) • Special Programs (update) • Grades (view) • Demographics (view) • Academic History (view) 	<ul style="list-style-type: none"> • (list training modules) • • •
Guidance Staff	<ul style="list-style-type: none"> • Schedules (update) • Discipline (view) • Attendance (view) • Enrollment (view) • Grades (view) • Demographics (view) 	<ul style="list-style-type: none"> • (list training modules) • • •
Health Staff	<ul style="list-style-type: none"> • Health (update) • Immunizations (update) 	<ul style="list-style-type: none"> • (list training modules) • • •
Directors	<ul style="list-style-type: none"> • Schedules (view) • Discipline (view) • Attendance (view) • Enrollment (view) • Demographics (view) 	<ul style="list-style-type: none"> • (list training modules) • • •
EL/Rtl Staff	<ul style="list-style-type: none"> • Schedules (view) • Discipline (view) • Attendance (view) 	<ul style="list-style-type: none"> • (list training modules) • •

Staff Group	Data Responsibilities	Training Needs
	<ul style="list-style-type: none"> Special Programs (update) Grades (view) Demographics (view) Academic History (view) 	<ul style="list-style-type: none">
Department IT Staff	<ul style="list-style-type: none"> Power user System functionality Update all student data Technical support 	<ul style="list-style-type: none"> (list training modules)
Parents/Students	<ul style="list-style-type: none"> Parent Portal Student Portal 	<ul style="list-style-type: none"> (list training modules)

Use the Microsoft Word templates in Appendix D to list your company’s Student Information System training module syllabi as shown in Table 4-4 below. In your Proposal, include a **separate** table for each of your company’s training modules.

Table 4-4: SIS Training Syllabus Template

Student Information System Module Name	
<p><i>Learning Objectives:</i> Enter the major learning competencies for this training module.</p>	
<p><i>Topics/competencies include:</i> List major topics/competencies covered in this module</p>	<p><i>Type:</i> Core or Optional Course</p> <p><i>Prerequisite:</i> List any prerequisites</p> <p><i>Delivery:</i> Type of training delivery</p> <p><i>Class Size:</i> List the class size limit</p> <p><i>Audience:</i> List all Department/school job roles that should take this course module.</p> <p><i>Length of Class:</i> List the length of the class in hours</p>

4.13.5 Vendor SIS Training Options

The WPS requests that the vendor describes and provide pricing for three training options to train all WPS personnel who will use the proposed Student Information Software. WPS seeks descriptions and cost estimates for three options.

- Vendor is responsible for training all staff using a variety of training formats to address all end-user needs.

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- Vendor trains core WPS staff using the train-the-trainer model that includes providing these trainers with end-user training outlines and resources in a variety of training formats to address all end-user needs.
- Hybrid training model that incorporates the two options listed above. This includes both the train-the-trainers model and some vendor provided training for power users (approximately 5% of the total number of end-users) on specific modules

Vendor Trains All Department and School Users

The Proposer is requested to describe their Student Information System training strategy to train all SIS end-users at the WPS and school levels as listed in Tables 4-5 and 4-6. Include which training methodologies are recommended and/or available for specific end-user groups and/or specific modules.

Train-the-Trainer Only

The Proposer is requested to describe their Student Information System training strategy to develop the required knowledge and competencies among a core group of WPS staff who will serve as in-Department trainers for the rest of the WPS staff. Include a description of the vendor provided support and training materials/resources that will be made available to this core group of WPS staff. Clarify if these materials/resources can be customized by the WPS staff. This model also provides for a certification process that ensures the WPS trainers have achieved the required competencies to effectively train other WPS staff.

Hybrid Train-the-Trainer and Vendor Provided Training for Specific End User Groups

The Proposer is requested to describe their Student Information System training strategy that includes both the train-the-trainers model and some vendor provided training for power users (approximately 5% of the total number of end-users) on specific modules. Include which training methodologies are recommended for specific power-users and/or specific modules. At a minimum, we expect a small number of power users will require advanced training on the following modules:

- Scheduling
- Attendance
- Registration
- Grading
- Reporting

Use the information in the tables below (Tables 4-5: School-level Staff and Table 4-6: Department-level Staff) to calculate the training time and costs for providing all SIS training. These tables summarize the job titles/roles for all personnel in the

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WPS who will require training on one or more Student Information System modules.

Table 4-5: WPS School-level Staff PreK-12 Training Needs by SIS Application Module

WPS Staff		SIS Training Needs															
Staff Groups	#	System Navigation	General Student Information	Registration	Student Scheduling	Attendance	Discipline	Grade Reporting	Academic History	Teacher Grade book	Special Programs	Master Scheduling	Report Creation	Assessment/Testing	Teacher/2341Parent Portal	Health	State Reporting
School-level Staff																	
Principals	51	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Assistant Principals	62	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Clerical Staff	116	X	X	X	X	X	X				X		X				
Classroom Teachers	2118	X	X	X		X	X	X		X					X		
Special Education (OT, PT, ABA, etc.)	21	X	X			X	X	X	X								
Guidance Staff	47	X	X	X	X	X	X	X	X		X			X			
Nurse/Health Staff	110		X													X	
Library/Media Specialist	11	X	X												X		
School Adjustment Counselors/ Psychologist/ Wraparound Coordinators	110	X	X	X		X	X	X	X	X	X		X	X	X		
Tutors	59	X	X						X								
Total School Staff	2705	2705	2705	2525	276	2525	2525	2388	350	2341	386	113	339	270	2341	223	

Table 4-6: WPS Department-level Staff Training Needs by SIS Application Module

WPS Staff		SIS Training Needs															
Staff Groups	#	System Navigation	Gen. Student information	Registration	Student Scheduling	Attendance	Discipline	Grade Reporting	Academic History	Teacher Grade book	Special Programs	Master Scheduling	Report Creation	Assessment/Testing	Teacher/Parent Portal	Health	State Reporting
Department-level Staff																	
Superintendent/ Assistant Superintendents	2	X	X										X				
Department-level Administrators	27	X	X										X				
Special Education/ Student Services	36	X	X										X				
Directors/ Managers	20	X	X										X				
Department Specialists/ Miscellaneous	15	X	X										X				
IT Staff/Data Analysts	31	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Curriculum Liaisons	10	X	X										X				
Parent Information Center Staff	7	X	X	X	X	X	X	X	X	X	X	X	X	X	X		
Transportation Staff	7	X	X										X				
Administrative Support Staff	40	X	X			X	X		X		X		X				
Total Department Staff	195	195	195	38	38	78	78	38	78	38	78	38	195	38	38	31	31
Total WPS Staff	2900	2900	2900	2563	314	2603	2603	2426	428	2379	464	151	534	308	2379	254	31

Vendors should summarize their overall training requirements using the template in Appendix D for Table 4-7: SIS Department Training Summary Table and place the table in their response to this RFP.

The cost to train staff as outlined using this data table also appears in Appendix B: Tab 4: SIS Training Services costs. The vendor is requested to use this form to submit training costs for Department-wide training for the three options outlined for training all WPS staff on the Student Information System.

Table 4-7: SIS Department Training Summary Table

Student Information System Training Services	No. of Department Staff	Length of Training Course or Module in Hours	Total Training Hours Required
Student Information System Modules to be trained:			
• SIS System Navigation	2900		
• General Student Information	2900		
• Registration	2563		
• Student Scheduling	314		
• Attendance	2603		
• Discipline	2603		
• Grade Reporting	2426		
• Academic History	428		
• Teacher Gradebook/Portal	2379		
• Special Programs	464		
• Master Scheduling	151		
• Report Creation	535		
• Assessment Testing	308		
• Parent/Student Portal	2379		
• Health	254		
• State Reporting	31		
SIS Entire Staff Option Total:	2900		
• SIS Train-the-Trainer Option	40		
• Certification Classes and Exams	40		
SIS Train-the-Trainer Option Total:	40		
• SIS Train-the-Trainer	40		
• Power User Direct Vendor Training (estimating 5%)	150		
Hybrid Option Total:	190		

4.13.6 Sample Training Curriculum and SIS Documentation

Please provide samples of your company's Student Information System training materials and your Student Information System Documentation on your Proposal Flash Drive. As a component of training, WPS seeks confirmation from the proposer for permission to record any live or virtual training sessions for future use by the WPS. In addition, the vendor will be responsible for video recording all WPS SIS training and preparing short video clips that are indexed by skill/competencies and by staff/role type to enable WPS to archive and retrieve specific training (just-in-time and on-the-job training) for new staff, etc.

5.0 PROCUREMENT PROCEDURE

WPS will select for award the most advantageous proposal offer from a responsive and responsible proposer, taking into consideration all evaluation criteria and price. Every Proposal will be reviewed and evaluated in terms of its conformance to the specifications in this RFP. Adherence to the RFP Response Format and Contents specified in Section 7 is **mandatory**. Any deviation or omission may result in disqualification.

5.1 Cost Proposal

Cost Proposal must include the estimated costs of furnishing all materials, equipment, labor, maintenance, complete and accurate data conversion costs for all data contained in the current system, training, operating manuals, and services necessary or proper for the completion of the work described in this RFP unless otherwise noted in the RFP. The WPS shall not be liable for any costs beyond those proposed in this RFP and awarded. Time and materials Proposals are not acceptable. Vendors must include all travel and living expenses in their Professional Services costs.

Proposals must include three years of fixed maintenance costs after the end of the first year following the expiration of the warranty period.

5.2 Disposition of Proposals

All Proposals become the property of the WPS. The successful Proposal shall be incorporated into the resulting contract by reference.

6.0 PROPOSAL EVALUATION PROCESS

A Student Information System Software Selection Committee shall evaluate submitted Proposals. The evaluation will be based on the evaluation criteria described in this Section 6, Proposal Evaluation Process of this RFP.

The Student Information System Software Selection Committee will evaluate the vendor Proposals and the finalists' Student Information System software demonstrations. The following sections describe the evaluation process in more detail.

6.1 Preliminary Evaluation

A preliminary evaluation shall determine whether each Proposal is complete and compliant with the instructions in this RFP. Any Proposals that are incomplete or that do not comply with the instructions or terms and conditions may be rejected and excluded from further consideration. Subsequent review and evaluation will be based on the criteria stated in the following sections.

6.2 Proposal Evaluation Process

Three main components make up the evaluation of the Student Information System software vendors: 1) the Student Information System Written Proposal; 2) the formal demonstration of the Student Information System software products; and 3) the three-year life cycle costs.

Student Information System Proposers will undergo a three-phase evaluation and selection process. Phase 1 consists of an evaluation of the Proposers' written RFP responses. Phase 2 includes the SIS software demonstrations. Phase 3 includes an analysis of the three-year life cycle costs

Vendors may be asked to clarify specific Proposal sections. These responses will be included in the overall scoring process.

6.3 Phase 1: Evaluation of Vendor RFP Responses

Proposals shall include all of the information solicited in this RFP, and any additional data that the respondent deems pertinent to the understanding and evaluating of the Proposal. Proposals shall be **organized, and sections tabbed as outlined in Section 7: RFP Format and Contents**. The respondent should not withhold any information from the written response in anticipation of presenting the information orally or in a demonstration, since the formal demonstration (Phase 2) will be scripted and timing will not allow unsolicited information. Each Proposer will be ranked based on an analysis of the criteria herein addressed.

6.3.1 Clarification of Submittals

At each phase in the evaluation and scoring process, the WPS shall have the right to seek clarification with respect to any matter included or omitted in a Proposal. The determination of whether or not a clarification is appropriate is within the sole discretion of the WPS. The areas in which clarification may be requested will include, but not be limited to:

- price or cost
- service and warranty
- maintenance
- backup
- hosting
- extent to which products and services are currently available
- extent to which the same will need to be developed
- issues related to personnel, trainers and training methodology
- delivery and implementation of systems
- any other matter where the WPS believes the information submitted is insufficient or omitted

The Proposer will be given an opportunity to clarify in writing, and the WPS may (but is not required to) adjust the rank it has given a Proposer who provides clarification based upon the WPS's interpretation and evaluation of the written clarification. The extent to which the rank may be adjusted, and the interpretations of the clarification are matters solely within the discretion of the WPS. This process may occur after Phase 1 "Clarification of Written Proposals" and after Phase 2 "Clarification of Demonstrations" of the evaluation process (according to the RFP Calendar). The written clarification will be deemed a part of the Proposal and shall be appended to the Proposal submitted.

6.4 Minimum, Mandatory, and Comparative Criteria

The following details the SIS mandatory criteria, software modules included in Appendix A: Functional Specifications, the subsections included in the narrative proposal, and the criteria to meet Highly Advantageous, Advantageous, Not Advantageous, and Unacceptable rankings.

Student Information System Mandatory Requirements/Minimum Criteria

All proposers must demonstrate that they meet the mandatory requirements/minimum criteria. Proposers that do not meet the mandatory/minimum will not be considered for further evaluation.

- vendor has successfully implemented the proposed solution in the school systems with at least 20,000 students and scalable to a minimum of 35,000 students

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- the system must allow for customization, specifically the ability to add data elements, attach business rules, and maintain the data through the user interface
- a web-based application wherein data is accessible via a standard web browser, 24/7/365 for a PC, MAC, Chromebook, tablet, and/or mobile device and conforms to Web Content Accessibility Guidelines (WCAG) allows database tracking of critical data changes by way of an audit trail that shows the data changes, who changed it, and the date of the modification
- all modules must be accessed through a single sign-on by the user and the authentication method must be compatible with WPS' Active Directory authentication for staff and students
- system must provide role-based access to the various functional areas of the system for all users, including itinerant staff who engage with students in multiple buildings across the school system, to student data based upon school systems' guidelines
- system must provide role-based access to the various functional areas of the system for "temporary staff" such as substitute teachers, student teachers, etc. based on district guidelines around student data privacy policies
- provides for online edits and data validation by user role at the point of data entry (school system may alter any specific validation rule); data validations aligned with state data collection error messages, as well as school system needs
- provides for MA DESE state reporting for both K-12 surveys (as detailed in RFP section 4.5.3 and tab 14 of this document) and is committed to maintaining that support from year to year
- has the ability to interface with other WPS' applications as detailed in Appendix C - Student Information System Interface Requirements
- all SIS components meet or exceed information security requirements of HIPAA, FERPA, and CIPA, as applies to individual modules
- SIS application/vendor is MA SIF (School Interoperability Framework) certified to support SIMS, EPIMS, SCS, and SDDR; supports SASID and MEPID acquisition
- SIS vendor has an approved Data Privacy Agreement for MA with the SIS

Functional Specifications Requirements and Comparative Criteria

In addition, the proposer must provide detailed information regarding the degree to which their system addresses the Appendix A: SIS Functional Requirements in the following Student Information System software modules:

- General Application Requirements
- Student Registration
- Student Attendance Accounting
- Student Scheduling

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- Grade Reporting
- Student Assessment
- Student Discipline
- Student Health
- Guidance and Special Services
- Online Teacher Portal
- Online Parent/Student Portal
- Reports and Data Analytics
- Mass DESE State Reporting
- Design and Architecture Requirements
- Data Exchange among WPS application systems

Each sub-category listed on each of the previously described fifteen (15) functional areas will be rated separately and a combined total ranking will be determined according to the following criteria based upon the WPS Requirements as specified in Appendix A:

- Highly Advantageous: SIS meets 93-100% of the WPS specifications
- Advantageous: SIS meets 85-92% of the WPS specifications
- Not Advantageous: SIS meets 77-84% of the WPS specifications
- Unacceptable: SIS meets fewer than 77% of the WPS specifications

RFP Narrative Proposal Evaluation Process

The written narrative includes following twelve subsections:

- Firm Qualification Requirements
- Project Management Approach
- Proposed Technical Environment
- Proposed Solution Approach
- SIS Systems Integration
- SIS Business Process Improvement
- Proposed Program for System Enhancement and Improvement
- Proposed Testing Strategy
- SIS Data Conversion Strategy
- SIS Support and Maintenance Program
- SIS Security Strategy
- SIS Training Approach

To evaluate the written proposals, each subsection in Section 4: Proposal Summary and Proposal Organization will be given an overall ranking designation of Highly Advantageous, Advantageous, Not Advantageous, or Unacceptable based upon the completeness, quality, and understanding provided in each narrative subsection. The following criteria will be used to determine the subsection rankings:

Highly Advantageous

- All of the questions in each subsection must be answered completely.
- The quality of the proposer response must be thorough and of high quality.

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- The proposer thoroughly demonstrates an understanding of the subsection questions.

Advantageous

- Most of the questions in each subsection are answered completely.
- The quality of the proposer response must be good to excellent for the questions the proposer responds to.
- The proposer demonstrates an understanding of the subsection questions.

Not Advantageous

- Proposers that only partially answer the questions in a given subsection.
- The Proposer responses to the subsection questions are not of high quality.
- The proposer does not provide a response that demonstrates a thorough explanation of the section questions.

Unacceptable

- The proposer's response to a subsection is not addressed or is totally lacking in substance.
- The proposer only addresses only one or two points of the subsection questions.

Following the evaluation of the narrative proposal and Appendix A, the WPS SIS Software Selection Committee will determine which proposers meet the Highly Advantageous or Advantageous evaluation criteria required to advance to Phase 2. These vendors will be invited to participate in Phase 2 consisting of the scripted software demonstrations that address WPS highest priority areas. The priority areas of focus for the vendor demonstrations are determined by the WPS SIS Selection Committee following the review of the written proposals.

Vendors may be asked to clarify specific Proposal sections. These responses will be included in the overall scoring process.

6.5 Phase 2: SIS Selected Proposers Formal Software Demonstration

The selected proposers will be contacted by WPS to prepare for a Student Information System product demonstration.

The Student Information System demonstration will consist of a formal demonstration script. These scripts and additional questions to be covered in presentations shall be considered part of this RFP. The presentations will take place virtually or at the WPS's Administrative Offices between **November 9-10, 2020 and November 12-13, 2020**.

The detailed vendor demonstration scripts define the features to be demonstrated and the amount of time provided for each module to ensure all vendor demonstration are conducted in a consistent manner. Each section of the vendor demonstrations will also be ranked according to the Highly Advantageous, Advantageous, Not Advantageous, and Unacceptable rankings. These rankings will be based upon the user-friendliness of the application, work flow processes demonstrated, and inclusion of all elements listed in the

demonstration script for each module. The following criteria will be used to determine the module rankings:

Highly Advantageous

- All of the elements included in the script were fully demonstrated.
- Work flow processes were clearly defined and assisted end-users with accomplishing the task in an efficient manner.
- The proposer thoroughly demonstrated an understanding of the module and clearly addressed WPS questions and clarifications.

Advantageous

- Most of the elements included in the script were fully demonstrated.
- Work flow processes were defined and assisted end-users with accomplishing the task in an efficient manner.
- The proposer demonstrated a working understanding of the module and addressed WPS questions and clarifications.

Not Advantageous

- Some of the elements included in the script were demonstrated.
- Work flow processes were somewhat defined and assisted end-users with accomplishing the task or an was alternative provided.
- The proposer demonstrated a limited understanding of the module and did not adequately address WPS questions and clarifications.

Unacceptable

- Few of the elements included in the script were demonstrated.
- Work flow processes were not well defined nor alternatives presented.
- The proposer does not demonstrate an understanding of the module or WPS needs/priorities.

6.6 Phase 3: Three-year Life Cycle Cost Analysis & Criteria

The analysis and scoring of the Proposers' three-year life cycle costs will be conducted after the review of the written narrative and Appendix A: Functional Specifications and then combined with the written RFP evaluation.

Final Clarification

The committee may decide to seek additional clarification from one or more Proposers if information is necessary to make a final decision. WPS will email the Proposers asking additional clarification, Proposers are allowed to email back their response but must follow up with a hard copy in the mail.

Proposal rankings may be adjusted considering the new information received during final clarification.

6.7 Basis of Award

WPS will select for award the most advantageous proposal offer from a responsive and responsible proposer, taking into consideration all evaluation criteria and price.

6.8 Additional Terms and Conditions

The WPS reserves the right to add terms and conditions during contract negotiations. These terms and conditions will be within the scope of the RFP and will not affect the Proposal evaluations.

7.0 RFP RESPONSE FORMAT AND CONTENTS

To maintain comparability and enhance the review process, Proposals shall be organized in the sequence shown below and shall include all of the elements and information described in the following sections:

Proposal Form

- A. See **Submittal Requirements** for complete details.

It is not necessary to return every page of this document with the Proposal; return only the pages that require signatures or information.

- B. Offeror should submit one (1) original and a minimum of six (6) print copies of their Proposal to the Issuing Office. Offeror shall also submit two (2) electronic copies (USB flash drive) of their Proposal with their responses each containing the final RFP response in both Word and Excel formats (Appendix A and B must be saved in Excel format). The final RFP Proposal with signatures must then be scanned and saved in PDF format. Note solicitation number and name of company on the **flash drive**. The Student Information System Total Cost Summary forms (Appendix B) should be provided in a separate, sealed envelope. Include the Student Information System Total Cost Summary forms in Excel format on the flash drive.
- C. Terms and conditions differing from those in this RFP may be cause for disqualification of the Proposal.

7.1 RFP Closing Date and Time

RFPs may be delivered up to but not later than 10:00 a.m., EDT, Wednesday, September 30, 2020 to:

Mr. Christopher J. Gagliastro, MCPPO

Purchasing Agent

City of Worcester

455 Main Street, Room 201

Worcester, MA 01608-1895

Email address: gagliastroc@worcesterma.gov

Print proposals must be submitted on 8-1/2 x 11 white paper and shall include a Table of Contents properly indicating the section and page number of **each numbered section** for the information included. Elaborate bindings or other presentation aids are not required and will not enhance the overall evaluation of the Proposal. Three ring binder submittals are preferred but will not affect scoring.

All responses must include the Department Proposal Certification Sheet. The cover sheet should include the names, addresses, and telephone numbers for the Offeror, authorized contact persons, authorized signatures (i.e., the owner or other responsible person of the agency), the nearest regional office, and members of the Offeror Proposal team.

Offeror may recite the contents of this RFP in their Proposal. However, in the event there is a discrepancy between this RFP (including subsequent addenda) and the RFP language included in Offeror Proposal, the language of this RFP and its addenda shall prevail.

Proposals should be prepared simply and economically with emphasis on specific experiences and capability to perform work for similar government entities using a public procurement system. Information relating closely to those tasks outlined above will be weighed most heavily.

All Proposals must be **numbered** in the format required in this RFP. Failure to comply may be reason to declare the Proposals nonresponsive. For a detailed description of what is required in each Tab, see sections 7.3 through 7.10.

7.2 Required Proposal Tabs – Section/Sub-Section Headings

Tab 0 – Completed Bid Proposal Response Form (FORM “A”) (Non-Ranked)

Addenda – sign and return all Addenda (Non-Ranked)

Table of Contents (Non-Ranked)

Tab 1 – Executive Summary (Non-Ranked)

Tab 2 – SIS Functional Requirements Response Forms (Appendix A)

Tab 3 – SIS Total Cost Summary Forms

Tab 4 – Technical Proposal

Tab 5 – Additional Required Attachments (Non-Ranked)

7.3 Proposal Certification Form

Include the RFP Cover Sheet (provided herein) of this RFP with an original signature of an agent authorized to bind the company, title, and all requested information.

7.4 Acknowledgement of Addenda

The Proposer must attach the addenda to this RFP that it has received, indicating the addenda number and the date issued.

Any changes to the RFP will be issued as an addendum and transmitted electronically as stated herein.

7.5 Table of Contents

The table of contents shall clearly identify the material by section and by page number.

7.6 Tab 1 ~ Executive Summary

The executive summary shall summarize the contents of the technical Proposal in a way that gives readers a broad understanding of the entire Proposal. Vendors should provide an overview of the Student Information System Product including screen shot illustrations of key product capability as a supporting attachment to their RFP submission.

7.7 Tab 2 ~ SIS Functional Requirements Response Forms

The Student Information System Functional Requirements Response Forms, found in Appendix A, shall be completed and included with the Proposal.

7.8 Tab 3 ~ SIS – Total Cost Summary Forms Instructions

The Student Information System Total Cost Summary Forms (Appendix B) must be used by the Proposer to provide the necessary pricing data for the Proposal evaluation. The Student Information System Total Cost Summary Forms consist of six (6) Sheets. Sheets 1 through 4 capture the total three-year Student Information System cost for a **Vendor-hosted environment**; while Sheet 5 is provided to list the Vendor Consultant Hourly Rates. Sheet 6 is provided for vendors to list additional product offerings and their estimated costs for information purposes only.

The cost forms must be submitted under a separately sealed envelope to comply with the evaluation procedure. The Proposer's response must contain all prices as defined on these forms. Proposers choosing to propose more than one alternative must use a separate cost form for each of the sections of their respective Proposals differing from one another. Should additional forms be required, they must be clearly marked as "1 of _" to allow for appropriate evaluation.

The Proposal must provide cost forms, that reflect implementation costs of all Student Information System components. The WPS is interested in a single fixed price enterprise license for operation of the proposed Student Information System throughout the WPS.

The costs must be specified separately as follows.

- Vendor-hosted Student Information System Total Cost Summary (Cost Form 1)
- Student Information System Installation Services (Cost Form 2)
- Student Information System Data Interfaces (Cost form 3)
- Student Information System Training Services (Cost Form 4)
- Vendor Consultant Hourly Rates (Cost Form 5)
- Optional Application Offerings (Cost Form 6)

7.8.1 Individual Form Instructions

This section describes the necessary information to be provided on each required cost form.

Vendor-Hosted SIS Total Cost Summary (Cost Form 1)

The Vendor-Hosted Student Information System Total Cost Summary (Cost Form 1) is included as an aggregate that automatically totals and presents data from of all detailed cost sheets. This summary sheet addresses the following components for the WPS.

- Student Information System Enterprise Licenses (year 1)
- Vendor hosted licenses (years 2 through 3)
- Vendor hosting services
- Vendor Implementation Project Management, to include a minimum of 6 days (onsite if appropriate) for initial project planning, pilot planning, and project “go live”
- Configure/Customize Student Information System to WPS requirements
- Student Information System Operational Process Redesign Assistance – this includes consulting support in assisting the WPS staff in redesigning their Student Information System business processes
- Report Development Assistance for required reports for WPS
- Development of WPS customized training materials/tutorials – includes the preparation of “just-in-time” video clips aligned to required skills/competencies from WPS SIS training for use by the WPS
- Documentation customized for WPS staff
- Appendix A – Student Information System Functional Requirements customization – this includes the cost of development for extending the

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vendor's product to meeting all the functional requirements listed in Appendix A

- WPS Student Information System (SAGE & HR) data conversion and import services
- Integration with other WPS systems (SIS data interfaces) – this includes consulting support to lead the task of interfacing with all WPS administrative systems that share data with the new SIS
- Student Information System Training costs for training the WPS school and WPS staff that includes refresher training at the 6 month and 1-year intervals

The Proposer must specify the total cost of the total solution on this form. Any development or customization needed to produce the required functionality as specified in the RFP must be accounted for in the price the Proposer specifies for that application set component. The Installation Services Total is to be taken from the Student Information System Installation Services Form (Cost Form 2).

SIS Installation Services (Cost Form 2)

Vendor-supplied Student Information System Installation Services are to be recorded on Student Information System Installation Services (Form 2). WPS anticipates the following types of Installation Services to be supplied by the Proposer:

- Vendor Implementation Project Management with WPS Project Manager that includes a minimum of 6 days implementation planning onsite at key milestones throughout the system implementation.
- Configure/Customize Student Information System to WPS requirements.
- Appendix A – Student Information System Functional Requirements customization – this includes the cost of development for extending the vendor's product to meet all the functional requirements listed in Appendix A.
- Report Development Assistance – refer to Appendix C of the RFP for the WPS required reports.
- Development of WPS customized training materials/tutorials – the vendor will be responsible for video recording all WPS SIS training and preparing short video clips that are indexed by skill/competencies and by staff/role type to enable WPS to archive and retrieve specific training (just-in-time and on-the-job training) for new staff, etc.

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- Student Information System Operational Process Redesign Assistance – this includes consulting support in assisting WPS payroll staff in redesigning their Student Information System business processes.
- Student Information System data conversion and import services.
- Student Information System data interfaces with other WPS systems as identified in Appendix C.
- These costs will be summarized in the Total Price column of the Student Information System Total Cost Summary (Cost Form 1).

SIS Data Interfaces (Cost Form 3)

Vendor costs for developing, testing application APIs, and/or data transfers for all the WPS applications listed in Cost Form 3 should be provided. These costs will be summarized in the Total Price column of the Student Information System Total Cost Summary (Cost Form 1).

SIS Training Services (Cost Form 4)

Vendor-supplied Student Information System Training Services are to be recorded on Student Information System Training Services (Cost Form 4). Cost Form 4 provides the number and types of Department administrative and building level staff that need to be trained in the proposed Student Information System. The Proposer should list the length of the training (in hours) required by each course training module. The total WPS staff training hours will automatically produce the Total Training hours required. Proposers will then have sufficient information to determine the cost of training for each training module category. Proposers should plan for a class size of 20 participants (if face-to-face). Please refer to Section 4.13.4 for determining the number and types of Student Information System training classes required. Vendors should calculate the costs for the initial training effort as well as two follow up refresher training sessions at the six month and first year intervals. These costs shall include a refresher allowance for the fall of year 2.

Student Information System training costs will be automatically transferred to the appropriate line of the Total Price column of the Vendor Hosted Student Information System Total Cost Summary (Cost Form 1).

The WPS expects to purchase a packaged solution for a firm fixed cost. Any development or customization needed to produce the required functionality as specified in the RFP must be accounted for in the price the Proposer specifies for that application set component. The Installation Services Total is to be taken from the Student Information System Installation Services Form (Cost Form 2).

Vendor Consultant Hourly Rates (Cost Form 5)

Hourly rates for staffing are to be recorded on the Vendor Consultant Hourly Rates Form (Cost Form 5).

- Cost of “Data Conversion Specialist”.
- Cost of “Application Programmer”.
- Cost of “Systems Analyst”.
- Cost of “Applications Training Specialist”.
- Cost of “Business Process Analyst”.

This cost schedule will be used if the WPS wants to purchase additional support services. The rates must be effective for the duration of the contract.

Optional Application Offerings (Cost Form 6)

Proposers are asked to provide summary information and estimated costs of other school system products that they offer.

7.9 Tab 4 ~ Technical Proposal

The technical Proposal shall be organized and **numbered** into a Table of Contents as outlined below. **Proposers should reference Section 4 of this RFP for an explanation of the contents of each section.** Proposer **MUST number** each section of their response to correspond with the proposal required sections as listed below.

Table of Contents

- 4.1 Introduction Letter signed by an authorized agent of the business/corporation with proof of authorization from the business/corporation (Introduction to the Technical Proposal).
- 4.2 Firm Qualifications Requirements.
 - 4.2.1 Firm History and Background.
 - 4.2.1.1 General Information about the Proposer’s organization.
 - 4.2.1.2 Identification whether the firm is the prime Proposer or subcontractor on this project.
 - 4.2.1.3 Date Established.
 - 4.2.1.4 Corporate Office Location.
 - 4.2.1.5 Licenses & Certifications.
 - 4.2.1.6 Documentation from the appropriate state’s agency confirming firm’s legal entity type (e.g., sole proprietorship, partnership, limited liability partnership, corporation, limited

liability corporation, etc.). For non-Massachusetts businesses, submit documentation from the state in which the business was formed and documentation from the State of Massachusetts providing authorization to perform business in the state of Massachusetts.

4.2.1.8 Federal Identification Number of Firm.

4.2.1.9 Ownership Interests.

4.2.1.10 Active Business Venues (counties, states, etc.).

4.2.1.11 Present Status and Projected Direction of Business.

4.2.1.12 Number of Technical and Service Staff available to support installation, training, documentation, and maintenance efforts.

4.2.1.13 Number of technical staff devoted to new product development and/or enhancements to current Student Information System project.

4.2.2 Firm Required Financial Information

All respondents shall supply their most recent financial statement, preferably a certified audited financial statement of the last available fiscal year, or their most recent tax return and balance sheet. Respondents should also supply bank references and Dun and Bradstreet report (if available).

4.2.3 Customer References

Please provide at least three (3) school System references for the Student Information System with the current software release fully implemented with a student enrollment of 50,000 students or more.

4.2.4 Project Team Organization Chart/Structure

The organization chart should include the Proposer's and **Department-provided resources** as defined in Table 4.1 to provide the WPS an understanding as to how the Proposer envisions using its and the WPS's resources.

4.2.5 Project Team staffing

The Proposer must define the roles and responsibilities of each of its assigned staff. In addition, please provide complete resumes of each staff member. Resumes should include work history related to Student Information System installation assignments. In addition, the Proposer should discuss the roles and responsibilities of the Department-provided resources.

4.3 Project Management Approach Requirements

Approach and Methodology – The Firm’s approach and methodology of how the services herein addressed will be provided.

- 4.3.1 Project Workplan
- 4.3.2 Workplan Management
- 4.3.3 Risk Management Approach
- 4.3.4 Change Management Approach
- 4.3.5 Issues Management Approach
- 4.3.6 Quality Management Approach
- 4.3.7 Knowledge Transfer Approach
- 4.3.8 Communications Plan
- 4.4 Proposed Technical Environment
 - 4.4.1 Description of Vendor Hosted Environment
 - 4.4.2 Department Network Infrastructure Requirements
 - 4.4.3 Database Structure
 - 4.4.4 Back-up
 - 4.4.5 Department Data Access
 - 4.4.6 Single Sign-on
 - 4.4.7 3rd Party Applications
- 4.5 Proposed Solution Approach
 - 4.5.1 Approach to Meeting SIS Requirements
 - 4.5.2 Approach to Interfacing with other Department Mission-critical Applications
 - 4.5.3 Approach to WPS and Massachusetts DESE Reporting
- 4.6 SIS System Integration
 - 4.6.1 Required 3rd Party Data Exchange Integrations
 - 4.6.2 Data Exchange Protocol
 - 4.6.3 Manage the Data Exchange Process
- 4.7 SIS Business Process Improvement
 - 4.7.1 Student Attendance and Engagement
 - 4.7.2 Student Registration
 - 4.7.3 Predictive Analytics and Alerts
 - 4.7.4 Data Access, Dashboards, and Reporting
- 4.8 Proposed Approach to Enhancements and Customizations
 - 4.8.1 Approach to Enhancing SIS Software
 - 4.8.2 Software Customizations for School Department
- 4.9 Testing Strategy
 - 4.9.1 Approach and Description of Testing Strategy

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- 4.9.2 Approach to Testing Documentation
- 4.9.3 Approach to Using Testing Tools
- 4.10 SIS Data Conversion Strategy
 - 4.10.1 System Conversion Critical Success Factors
 - 4.10.2 Approach to Data Conversion
 - 4.10.3 Overview of the Data Conversion Process
 - 4.10.4 Approach to Conversion Documentation
- 4.11 SIS Support and Maintenance
 - 4.11.1 Warranty
 - 4.11.2 Ongoing SIS Maintenance Program
 - 4.11.3 Ongoing Program for SIS Product Enhancement
 - 4.11.4 Customer Call Center (Helpdesk) Management
- 4.12 Security Strategy
 - 4.12.1 Security Architecture
 - 4.12.2 Managing Security
- 4.13 Training Approach
 - 4.13.1 Training Philosophy
 - 4.13.2 Training Methodology
 - 4.13.3 Development of a Training Plan
 - 4.13.4 Vendor SIS Curriculum and Training Modules
 - 4.13.5 Vendor SIS Training Options
 - 4.13.6 Samples of Training Curriculum and SIS Documentation

Attachments

Should any form not have sufficient space, Proposers may add attachments in the same format provided herein. Notwithstanding any omissions or unspecified items in this RFP, the Proposer is required to include all software and other components necessary for the successful implementation and operation of the entire WPS, including auxiliary functions and entities. It is incumbent upon the Proposer to point out any such omissions or unspecified items and to include their costs, if any, on the appropriate cost forms. An attachment to that cost form, describing the items, must accompany the Proposer's response.

7.10 Tab 5 ~ Additional Required Attachments

This tab includes all forms and required documentation detailed in Section 9.0.

8.0 TERMS AND CONDITIONS

The following terms and conditions shall apply to the contract between the city and the successful proposer (may be referred to in this Article 8.0 as “contractor”).

The WPS reserves the right to reject any RFP Proposal that deviates substantially from the stated terms and conditions, or that offers terms and conditions less favorable to the WPS than those set forth in this section.

8.1 Products and Services to be provided by Contractor

8.1.1 General Scope

Contractor shall provide to the WPS, on the Contract terms and conditions, all products and services required for the development, installation, and maintenance of the SIS as defined in the RFP # 7445-W1, Student Information System, other than the provision of hardware and Third Party Software expressly excluded under the terms of this Contract and the responsibilities expressly reserved to the WPS as set forth in the Statement of Work. Without limiting the generality of the foregoing, Contractor shall provide all those Services and Deliverables as are set forth in the Statement of Work.

8.1.2 Order of Precedence

This Contract, the Appendices, Exhibits and Attachments attached hereto, the RFP, any Addenda and the Proposal, are to be interpreted so that all of the provisions are given as full effect as possible. In the event of a conflict between these documents, the order of precedence shall be: first, the Contract (as it may be amended) entitled “Software and Services Contract”; second, any Appendix, Exhibit or other attachment to the Contract; third, the RFP dated Monday, August 17, 2020 and as modified by any Addenda; fourth, the Proposal submitted on Wednesday, September 30, 2020. Notwithstanding any provision to the contrary, in no event shall the terms or conditions of the software license, Appendix A or the maintenance agreement, Appendix B, take precedence over these terms or conditions.

8.1.3 Software Maintenance Services

During the term of this Contract, Contractor shall provide all services required by the WPS to maintain and upgrade the SIS Software as set forth in the Contract. After the expiration of the term of the maintenance services, the fee for extensions may be increased by Contractor to Contractor’s prevailing level for similar maintenance services to similar customers, but in no event increased each year by more than 3.0% over the annual fee in effect for the preceding one-year period of maintenance services. Nothing herein shall be deemed to obligate the WPS to purchase maintenance services beyond the term of this Contract.

8.1.4 Adoption of Updates, etc.

In creating and delivering the maintenance materials, software, equipment, Contractor shall make selections that avoid the need for the WPS to upgrade any Platform Software.

8.1.5 Electronic Delivery

All Deliverables of Licensed Software and Documentation required or permitted under the terms of this Contract shall be delivered from a point of transmission outside of facilities owned or operated by the WPS by electronic transmission via common telecommunications carrier or the public Internet to and for storage within computing hardware and electronic storage devices owned or under the control of the WPS. No tangible media Object Code, Source Code, or Documentation shall be delivered to the possession and/or ownership of the WPS.

8.1.6 Standard of Care

The Contractor shall provide the Software and perform the Services in accordance with the standards of care, skill, training, diligence, and judgment provided by highly competent individuals performing services of a similar nature to those described in the Contract and in accordance with the terms of the Contract. The Contractor shall be responsible for the reliability and the security of the private information maintained by the Software, as well as its non-interference all with aspects of the City's existing computer and related systems. The Contractor shall be responsible for the professional and technical accuracy and the coordination of all work furnished under this Contract. The Contractor shall furnish appropriate competent professional services for each aspect and task so that detailed checking or reviewing by the City is not necessary. Notwithstanding any provision to the contrary, the City's review, approval, testing, acceptance or payment for any of the equipment, materials, labor, and/or services furnished shall not be construed to operate as a waiver of any rights under this Contract or any cause of action arising out of the performance of this Contract.

Without limiting the generality of other provisions of this Contract, in the event that any aspect of the Contractor's performance fails to comply with applicable law due to the Contractor's negligence, the Contractor shall make all necessary corrections at no cost whatsoever to the City.

8.1.7 Acceptance of Deliverables

Delivery of a Deliverable shall not be deemed complete unless and until the Deliverable shall have successfully completed the Acceptance Tests specified in section 4.9 Testing Strategy for such Deliverable. In the event that a Deliverable shall not satisfy the requirements of the applicable Acceptance Test, Contractor shall promptly correct and/or revise the Deliverable such that the Deliverable shall satisfy the requirements of the specified Acceptance Test and shall continue to correct and/or revise the Deliverable until such time as the Acceptance Test for such Deliverable shall have been completed

successfully to the WPS's satisfaction. No failure to object or inaction on the part of the WPS shall be deemed an acceptance of any Deliverable under this Contract, nor to delay or waive the due date for any Critical Deliverable. In the event the WPS fails to meet its obligations for timely review of Deliverables, Contractor may notify the WPS in writing and, if ten business days pass without WPS acceptance or rejection, Contractor may elect to invoke the Issue Resolution Process. Upon the invocation by Contractor of the Issue Resolution Process, the due date for any subsequent Deliverable that is dependent on the Deliverable for which WPS review is not yet complete shall be extended by the amount of time by which such delay by the WPS reasonably delays Contractor's ability to deliver such subsequent Deliverable.

8.1.8 No Obligation of the Department

Nothing herein shall require the WPS to upgrade existing hardware or purchase any Third-Party Software other than Licensed Software from Contractor. The WPS shall be free in its sole discretion to select any vendor it so chooses for purchases in the event the WPS opts to enhance existing resources.

8.1.9 Documentation Standards

In connection with the delivery to the WPS of each installment, component, or version of the Licensed Software or maintenance materials, Contractor shall provide all Documentation reasonably required for the configuration, installation, testing, maintenance, and operation of such installment, component, or version, as required by the Statement of Work. Technical Documentation shall be in most cases in the form of electronic tutorials and written in a manner sufficient to enable a software engineer or programmer ordinarily skilled in the art and in the use of the Platform Software to maintain such software with commercially reasonable effort, to make reasonable modifications and enhancements for maintenance of existing functionality, and to aid in isolating and correcting design or functional errors in the Licensed Software. Documentation of user instructions shall be in accordance with best industry practices for similar software. Acceptance testing shall include review of associated Documentation for compliance with these standards.

8.1.10 Amendments

This Contract may be amended or modified only by written instrument duly executed by the parties.

8.2 Key Personnel

WPS requires assurances as to the consistency and quality of vendor staffing for its project. Key points of WPS's key personnel provision include:

- A. WPS shall have the ability to interview and approve key personnel proposed by the vendor.

- B. WPS shall have the right to reasonably require the contractor to remove key personnel from the project.
- C. Vendor key personnel may not be reassigned from the project without WPS's approval.

8.3 Warranty

Contractor hereby warrants to the City that all materials, equipment and services supplied or performed by Contractor will conform to applicable specifications, operate in substantial compliance with applicable documentation, and will be free from deficiencies and defects in materials, workmanship, design, and/or performance subject to the terms and conditions for a period of twelve (12) months, commencing on the date of "System Acceptance", see section 8.4. Further, the contractor hereby warrants that the system will conform in all material respects to the contractor's own system documentation for the current release for as long as WPS remains under agreement with the proposer. The rights and remedies provided herein and in Section 8.4 below are in addition to and do not limit any rights afforded to WPS by any other clause of this proposal or as may be available at law or equity.

The Proposer shall promptly address any function not conforming to the warranty provisions during the life of the warranty. In the event a problem cannot be fixed, the contractor shall promptly furnish an acceptable solution that provides a functionally equivalent replacement for the deficient module and any modules significantly impacted by the deficient system.

8.4 System Acceptance

For purposes of acceptance of the system (or portions thereof), a two-staged acceptance procedure shall be used for each phase and for the entire project. Key points include:

- A. "Conditional Acceptance" will occur at or prior to go-live. WPS will have up to forty-five (45) days to test the system ("pre-live testing") before going live.
- B. After "go-live," WPS will have a 90-day period after Conditional Acceptance to "live test" the system. Live testing is WPS's opportunity to verify that the system complies with the functional requirements and any other written specifications delivered to WPS by the vendor during the course of the project.
- C. If after the live testing the system performs in accordance with the system specifications (including the design document and functional requirements), WPS will issue "Final Acceptance." The 90-day time frame for Final Acceptance shall be extended if problems are found in the live test. Specifically, WPS expects to document the date the problem is found and the date it is certified as fixed. The acceptance period would pause when issues are reported and would restart on the date the problem is certified as fixed. The warranty period shall begin at the time of Final Acceptance.

8.5 Price Protection

WPS will require “price protection” for a minimum of two (2) years from the effective date of the agreement for additional WPS users and modules that are listed in the proposal but are not initially purchased.

8.6 Restrictions on Growth

WPS requires that any proposed licenses or fees to access the software be adequate to allow WPS to use the system unrestricted for all purposes of WPS and related City departments, as well as other third-party entities listed in this RFP. WPS will not be subject to expansion fees, additional license purchases, or fees for additional users, increases in WPS employee count, budget size, population size, or data storage requirements per the terms of the contract.

8.7 Public Record

No provision in this Contract, including but not limited to any software license agreement or any maintenance agreement, whether or not separately executed, shall purport to limit, condition or preclude the City, or any department or employee thereof, from timely responding to the Massachusetts Public Records law. Without limiting the foregoing, the City shall not be required to delay or to notify the contractor of any public record request, and shall not be liable to the contractor for its response to such a request.

8.8 Insurance

Contractor shall obtain and maintain errors and omissions insurance at its sole expense, sufficient to cover any claims, damages, liabilities, costs and expenses (including attorney’s fees) arising out of or in connection with contractor’s fulfillment of any of its obligations under this Contract. Errors and omissions insurance shall cover professional errors and omissions of contractor, its employees, officers and professional subcontractors. Coverage under each policy will be a minimum of One Million Dollars (\$1,000,000) for each instance and four Million Dollars (\$4,000,000) in the aggregate. Contractor shall require its insurance agent or carrier to provide thirty (30) days prior written notice to the certificate holder prior to any cancellation or termination of such insurance. If coverage is claims made, instead of occurrence basis, insurance shall include six year “tail” coverage.

Contractor shall obtain and maintain in force at all times during the term of this Contract, occurrence basic insurance coverages pertaining to commercial liability, property damage, data breach and cyber in at least the following amounts:

- Commercial General Liability ~ \$1,000,000 per occurrence/\$2,000,000 aggregate
- Excess/Umbrella Liability ~ \$2,000,000
- Data breach coverage ~ \$1,000,000 per occurrence/\$2,000,000 aggregate
- Cyber liability policy ~ \$2,000,000

The Contractor shall also obtain and maintain in force at all times during the term of this Contract Workers Compensation insurance satisfying the Massachusetts statutory requirements.

The City shall be named as an additional insured on said coverage and certificates, except workers compensation coverage.

The Superintendent, 20 Irving Street, Worcester, Massachusetts, 01609 shall be identified as a Certificate Holder. The Contractor shall require its insurance company(ies) to notify the Certificate Holder of any reduction or cancellation of the insurance at least thirty (30) days prior to the effective date of such reduction or cancellation. The Contractor shall furnish certificates of insurance evidencing coverage of the types and amounts required above upon request, in a form satisfactory to the City.

The City shall not be required to furnish insurance coverage for this contract.

8.9 Privacy Requirements

Contractor shall comply fully with any and all laws and regulations relating to confidentiality and privacy, including any rules or regulations of the City and shall at all times act in a prudent manner to protect personal data and other confidential and/or private information held by it. Without limiting the obligations above, contractor shall immediately notify the City orally and in writing if it becomes aware of any release or misuse of such data. Contractor shall cooperate with the WPS to prevent the misuse, regain possession of the data, or otherwise protect the WPS's rights to its data and the privacy of students, their families and City personnel. Contractor shall keep data collected secured on contractor's equipment. Such data shall only be released pursuant to this Contract upon mutual agreement or a court order of competent jurisdiction. In addition, contractor shall not disclose, release, transfer, rent, trade or sell information or data regarding students, their families, or City personnel to any third party except as required in order to fulfill the purposes of this Contract and as necessary to comply with applicable laws and governmental orders.

8.10 Independent Proposer

The contractor is an independent contractor and not an employee of the City of Worcester.

8.11 Non-Discrimination

In all hiring or employment made possible by or resulting from this Contract, the contractor (I) shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age or national origin, and (2) shall take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, age, or national origin.

No person in the United States shall, on the ground of race, color, religion, sex, age, or national origin, be excluded from participation in, be denied the benefits of, or be subject to discrimination under any program or activity made possible by or resulting from the contract. Contractor and each employer shall comply with all requirements imposed by or pursuant to Title VI of the Civil Rights Act of 1964.

8.12 Hold Harmless/Indemnification

To the fullest extent permitted by law, contractor shall defend, indemnify and hold harmless the City and its officers, officials and employees from and against all claims, damages, liabilities, injuries, costs, fees, expenses, or losses, including, without limitation, reasonable attorney's fees and costs of investigation and litigation, whatsoever brought because of any injury (including death) or damage received or sustained by any person, persons or property arising out of, or resulting from the contractor's breach of any provision of this Contract or any asserted negligent act, error or omission of the contractor, its officers, employees, consultants or other person for whom the contractor is responsible under this Contract.

The Indemnifications required hereunder shall not be limited by reason of the specification of any particular insurance coverage under this Agreement. Further, the contractor's obligations hereunder shall not terminate with the expiration or termination of this Contract, but shall survive it.

To the fullest extent allowed by law, contractor shall indemnify, defend and hold harmless the City, its officers, agents and employees from and against any loss, cost, expense or liability (including but not limited to attorney's fees and awarded damages) to the extent arising out of a third party claim that the Software, Services, or their use by the City, infringes, violates or misappropriates (collectively "Violate") a patent, copyright, trademark, trade secret or other intellectual property or proprietary (collectively "Intellectual Property") right of such third party. In the case of any claim alleging a Violation of Intellectual Property, contractor may procure for the City the right to continue using the Software, or modify or replace the infringing software so that it no longer infringes (as long as the functionality and performance are not degraded as reasonably determined by the City).

Insurance coverage requirements specified in this Contract shall in no way lessen or limit the liability of contractor under the terms of this indemnification obligation. Contractor shall obtain, at its own expense, any additional insurance that it deems necessary.

In no event shall the City indemnify or hold harmless the Contractor.

8.13 Assignment of Contract

Contractor shall not employ consultants or subcontractors, and shall not assign or transfer any part of its services or obligations under this Contract without the prior approval of and written consent of the City. The written consent shall not in any way relieve the contractor from its responsibilities pursuant to this Contract.

8.14 Intellectual Property

Intellectual Property shall be defined as copyrightable works, ideas, discoveries, inventions, applications for patents, and patents. Any improvements to Intellectual Property held by the contractor, further inventions or improvements, and any new items of Intellectual Property discovered or developed by the city under the terms of this Contract shall be property of the City. The contractor shall sign all documents necessary to protect the City's rights in such Intellectual Property, including the filing and/or prosecution of any applications for copyrights or patents. The contractor shall be solely responsible for ensuring that its activities comply with all copyright and patent

law, and that it obtains any and all appropriate approval(s) and/or licensure(s) where required.

8.15 Confidentiality of Student Records

Contractor understands and agrees that it is subject to all federal and state laws and the WPS rules and requirements relating to the confidentiality of student information. Contractor further agrees to comply with the Family Educational Rights and Privacy Act ("FERPA") 34 C.F.R. 99. Contractor shall regard all student information as confidential and will not disclose the student information to any third party.

8.16 Background Check

Pursuant to state and local laws, regulations and WPS policy, if contractor will be providing services on a school campus while students are present, or if contractor will have direct contact and access to students, the contractor must submit to a background check prior to commencement of such services at its sole expense.

8.17 No Third-Party Beneficiaries

Except with regard to Contractor's obligations under Section 8.12, indemnification, the covenants set forth in this Contract are intended solely for the benefit of the Parties and shall not be construed as consent by either party to be sued by third parties in any matter arising out of any this Contract.

8.18 Limit of Liability

The City shall not be required to limit the Contractor's liability. The City shall not be required to waive the protections of any federal, state or local law, regulation or ordinance, including but not limited to the Tort Claims Act, G.L. c. 258.

8.19 Risk of Loss

The contractor shall bear all risk of loss or damage to any and all Deliverables, including but not limited to Software, materials and equipment, until the purchase price has been paid and title has passed.

8.20 Audit

The City shall at all times upon reasonable notice, have the right to audit all books, papers, and records of the contractor relative to services performed pursuant to this Contract.

8.21 Severability

If any provision of this Contract is held invalid by any court or body of competent jurisdiction, the remainder of this Contract shall remain in full force and effect.

8.22 Survivorship

Those provisions that by their nature are intended to survive the expiration, cancellation, or termination of this Contract, including, by way of example only, the indemnification and privacy provisions, shall survive the expiration, cancellation, or termination of this Contract.

8.23 Taxes

WPS is exempt from any Taxes. State Exemption Certificate provided on request. The City shall have no obligation to pay any taxes relating to this Contract.

8.24 Rights Reserved

The WPS reserves the right to change policy expounded herein due to policy changes dictated by federal, state or municipal agencies. The Contractor shall comply with any and all federal, state and local laws, regulations and rules controlling or relating to this Project, as may be issued from time to time.

8.25 Financial Matters

8.25.1 Fee

Contractor will provide all Services, as defined in the RFP. All software license fees, equipment and materials costs, and all related labor, overhead, profit, transportation, and direct expenses are included in the fixed fee portion of the contract as defined in Appendix B, Cost Forms of the WPS's RFP # 7445-W1 and negotiated terms prior to award of the contract.

The City shall pay the Contractor for Services performed under this Contract only on the basis of written invoices or official documentation evidencing in complete detail, the propriety of the charges. The City shall make payments within forty-five (45) days after receipt of such invoice. The Fee is further described in the Project Fee Breakdown, as set forth in Appendix C, attached hereto and incorporated herein by this reference.

8.25.2 Milestones

WPS requires that all payments be based on successful completion of milestones. After WPS's acceptance of the milestone, and in no event more than once per month, the Contractor will invoice for the applicable milestone within that billing period. Milestone payment amounts shall either be a fixed fee.

8.25.3 Payment Terms

The WPS has the capabilities of Electronic Fund Transfer (EFT). List discounts, if any, for payments through Electronic Funds Transfer (EFT).

By submitting a Proposal (offer) to the WPS, the respondent expressly agrees that if awarded a contract, the WPS may withhold from any payment, monies owed by the respondent to the WPS for any legal obligation between the respondent and the WPS.

8.25.4 Form of Invoicing

Invoices shall itemize services, dates, and deliverables consistent with the terms of this agreement. Additional documentation shall be furnished by Contractor to the WPS's Accounts Payable Section upon request. Invoices shall be emailed to:

Worcester Public Schools
Accounts Payable Deborah Seymour
SeymourD@worcesterschools.net

8.25.5 Reduction of Scope

The WPS may determine to eliminate certain features of the Services or Deliverables from the scope of the Project. In such event, the parties shall negotiate in good faith as to an equitable reduction in the applicable prices set forth in the Pricing Schedule.

8.25.6 Suspension of Payments

In the event that any Critical Deliverable shall not be delivered or accepted on or before the applicable dates specified for such Critical Deliverable, all payment for Deliverables to be delivered subsequent to such delayed deliverable shall be suspended until the acceptance of all Critical Deliverables that have not been timely delivered or accepted. In no event, shall the suspension of a payment under this paragraph relieve Contractor from any other date for delivery or acceptance.

8.25.7 Allowance for Suspension or Delay Caused by Department (WPS)

The City may in its sole discretion suspend any or all activities under the Contract, at any time, when it determines it is in the best interest of the WPS to do so. The City shall provide the contractor written notice setting forth the particulars of suspension, including the estimated length of time the contract will be suspended. Examples of the reason for suspension include, but are not limited to, budgetary constraints, declaration of emergency, or other such circumstances. After receiving a suspension notice, the contractor shall comply with the notice. Within ninety (90) days, or any longer period agreed to by the parties, the City shall either 1) issue a notice authorizing resumption of work, at which time activity shall resume; or 2) terminate the Contract. Suspension of work shall not entitle the contractor to any additional compensation. An equitable extension of the schedule shall be the contractor's sole remedy.

8.26 Formalities, Term, and Termination

8.26.1 Contract Approval by the WPS

This Contract shall be effective upon execution by the authorized representatives of both Parties.

8.26.2 Term

The term of this Contract shall commence on the date of its full execution, pending both parties duly authorized signatories, and shall continue thereafter for a period of sixty (60) months, unless sooner terminated in accordance with this Contract.

8.26.3 Termination

8.26.3.1 Termination for Funding Restriction

This Contract may be terminated for a lack of appropriation.

8.26.3.2 Termination of Contract for Cause

If either party fails to fulfill in a timely and proper manner its obligations under this Contract for any cause, or if either party violates any of the terms, covenants and conditions of this Contract, then the offended party shall have the right to terminate this Contract by giving written notice to the breaching party of such termination and specifying the effective date thereof, said written notice to be given at least thirty (30) calendar days before the effective date of such termination. In such event, all records, documents, and assets of any nature whatsoever, or wheresoever situated, prepared, or purchased by the Contractor with federal, state or City funds under this Contract shall, at the option of the City, become its property, except only those expressly provided identified as the contractor's in this Contract. Notwithstanding the above, the Contractor shall not be relieved of liability to the City for damages sustained by the City for personal injury, property damage or otherwise by virtue of any termination of the Contract, and the City may withhold any payments to the Contractor for the purpose of set-off until such time as the exact amount of damages to the City from the Contractor is determined.

8.26.3.3 Termination for Convenience of the WPS

The City may terminate this Contract at any time by giving not less than sixty (60) calendar days' notice in writing to the Contractor. In such event, all records, documents, and assets of any nature whatsoever, or wheresoever situated, prepared, or purchased by the Contractor with federal, state or City funds under this Contract shall, at the option of the City, become its property,

except only those expressly provided identified as the contractor's in this Contract.

Notwithstanding the above, the Contractor shall not be relieved of liability to the City for damages sustained by the City for personal injury, property damage or otherwise by virtue of any termination of this Agreement, and the City may withhold any payments to the Contractor for the purpose of set-off until such time as the exact amount of damages sustained by the City is determined.

8.26.3.4 Termination Expenses

In the event of any termination of this Contract, the Contractor shall be paid in accordance with the appropriate invoicing procedure defined in Section X.X herein, for all authorized services performed to the termination date. No other termination expenses shall be allowed. Further, the City shall not be liable for any future payments, lost profits, lost opportunity, costs, or expenses of contractor incurred with respect to Services not actually performed.

8.12.5 Waiver

Neither Parties failure to act with respect to a breach by the other shall waive the offending party's right to act with respect to subsequent or similar breaches. The failure of either Party to exercise or enforce any right or provision shall not constitute a waiver of such right or provision.

8.26.4 Termination for Bankruptcy

This Contract may be terminated by either party, without notice, in the event that either Party shall have ceased business, become the subject of an order for relief or insolvent under applicable bankruptcy laws, or made an assignment for the benefit of creditors. (Source Code and Documentation will be transferred to the WPS for complete ownership).

8.26.5 Force Majeure

If by reason of any requirement of applicable law, act of God, pandemic, fire, strike, embargo, terrorist attack, war or any other military action, acts of local, state or national governments or public agencies, insurrection or riot or other causes beyond that Party's reasonable control, either Party is unable to carry out, either in whole or in part, any of its obligations contained herein, such Party shall not be deemed to be in default during the continuation of such inability, provided that: (i) the non-performing Party promptly gives the other Party hereto written notice describing the particulars of the occurrence and the anticipated period of delay; (ii) the suspension of performance be of no greater scope and of no longer duration than is required by the Force Majeure event; (iii) no obligations of the Party which were to be performed prior to the occurrence causing the suspension of performance shall be excused as a result of the occurrence; and (iv) the non-performing

Party shall use reasonable efforts to remedy with all reasonable dispatch the cause or causes preventing it from carrying out its obligations. Notwithstanding anything to the contrary in this Agreement, if a Force Majeure event continues for a period of thirty (30) days or more, the City may terminate this Agreement. Upon termination of this Contract pursuant to this Section neither Party shall have any obligation or financial liability to the other Party as a result of such termination.

8.27 Dispute Resolution and Remedies

8.27.1 Project Managers

All disputes, claims or controversies arising out of or relating to the validity, interpretation, performance, termination, breach, threatened breach of this Contract, or any failure to progress (“Dispute”) shall initially be referred by the Party raising the Dispute to the Project Managers designated by the Parties. If the Project Managers are unable through good faith discussions to resolve the Dispute within ten (10) Business Days after receiving written notice of the Dispute, the Dispute shall be submitted to the Senior Executives.

8.27.2 Senior Executives Resolution

If the Project Managers are unable to resolve the Dispute within ten (10) Business Days after submission by either or both Project Managers, the Dispute shall be referred to the Senior Executives. For the purpose of this provision, the for the purpose of this provision, the Senior Executives shall be the Superintendent for the WPS and the President for Contractor. Either party may re-designate its Senior Executive from time to time during the term of this Contract.

The Senior Executives of both parties shall meet at a mutually acceptable time and place, and thereafter as often as they reasonably deem necessary, to attempt to resolve the dispute. All reasonable requests for information made by one party to the other will be honored. If the Senior Executives are unable to resolve the Dispute within twenty (20) business days, the parties may pursue all claims based upon such Dispute as otherwise provided by law.

8.27.3 Continued Access

The parties agree as follows with respect to any Dispute or disagreement concerning the Licensed Software or component thereof or any of the transactions arising out of or contemplated by this Contract, during such Dispute or disagreement under this Contract or any proceeding to resolve such Dispute, pending final resolution of such Dispute or disagreement, Contractor shall not interfere with the access or use by the WPS of the Licensed Software. In addition, the Parties expressly agree that if any Dispute or disagreement arises with respect to the performance of any of either Party’s obligations that would otherwise delay the schedule for either Party’s performance of any of its subsequent obligations, to the extent technically and operationally feasible, each Party

shall proceed to the performance of such subsequent obligations according to the existing schedule as if such Dispute or disagreement were non-existent.

8.27.4 Applicable Law

The law of the Commonwealth of Massachusetts shall govern the validity, interpretation, construction and performance of this Contract, without giving effect to its provisions regarding choice of laws. Any suit brought hereunder shall be brought in the state or federal courts sitting in Worcester County, Massachusetts, the parties hereby waiving any claim or defense that such forum is not convenient or proper. Each party agrees that any such court shall have in personam jurisdiction over it and consents to service of process in any manner authorized by Massachusetts law. Each party shall be responsible for its own attorneys' fees and costs incurred as a result of any action or proceeding under this agreement.

8.28 Advertising

The successful respondent shall not publicly disseminate any information concerning the Contract without prior written approval from the WPS, including, but not limited to mentioning the Contract in a press release or other promotional material, identifying the City, WPS, or its officers or employees, or otherwise linking the Customer's name and either a description of the Contract or the name of the WPS, its departments, or employees, in any material published, either in print or electronically, to any entity that is not a party to the Contract, except potential or actual authorized subcontractors, distributors, dealers, resellers, or service representatives.

8.29 Compliance with Laws and Regulations

The Contractor shall be responsible to know and to apply all applicable federal and state laws, all local laws, ordinances, rules, regulations, and all orders and decrees of bodies or tribunals having jurisdiction or authority that in any manner affect the work, or that in any way affect the conduct of the work. Contractor shall always observe and comply with all such laws, ordinances, rules, regulations, orders, and decrees. Contractor shall protect and indemnify the WPS and all its officers, agents, servants, or employees against any claim or liability arising from or based on the violation of any such law, ordinance, rule, regulation, order, or decree caused or committed by respondent, its representatives, subcontractors, sub consultants, professional associates, agents, servants, or employees. Additionally, Contractor shall obtain and maintain at its own expense all licenses and permits to conduct business pursuant to this contract from the Federal Government, State of Massachusetts, or municipalities when legally required, and maintain same in full force and effect during the term of the contract.

8.30 Conflict of Interest

The Contractor warrants that it has complied with all provisions of law regarding the award of this Contract and that it, or its employees, agents, officers, directors or trustees have not offered or attempted to offer, and shall not during the course of this Contract offer, anything of any value to any employee of the City in connection with this Contract.

The Contractor further warrants that no employee of the City, including unpaid members of City boards and commissions, serves as an officer, director, trustee or employee of Contractor, and that no employees of the City have or will have a direct or indirect financial interest in this Contract.

Violation of this section shall be a material breach of this Contract and shall be grounds for immediate termination of this Contract by the City without regard to any enforcement activities undertaken or completed by any enforcement agency. Termination of this Contract pursuant to this section shall not waive any claims for damages the City may have against the Contractor.

8.31 Certifications Required by Law

The Contractor, by executing this document, certifies the following:

- (a) it has not given, offered or agreed to give any person, corporation or other entity any gift, contribution or offer of employment as an inducement for, or in connection with, the award of this Contract for engineering services;
- (b) that no consultant to or subcontractor for the Contractor has given, offered or agreed to give any gift, contribution or offer of employment to the Contractor, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the Contractor;
- (c) that no person, corporation or other entity, other than a bona fide full time employee of the Contractor, has been retained or hired by the Contractor to solicit for or in any way assist the Contractor in obtaining this Contract for services upon an agreement or understanding that such person, corporation or other entity be paid a fee or other consideration contingent upon the award of this Contract to the Contractor; and
- (d) that the Contractor, and any consultant to or subcontractor for the Contractor, represents, warrants and certifies that it has complied with all laws of the Commonwealth of Massachusetts relating to taxes and all Ordinances and Orders of the City of Worcester relating to taxes, fees and charges, or is lawfully contesting the validity of the same. The Contractor, and any consultant to or subcontractor for the Contractor, further represents, warrants and certifies that it will remain in such compliance during the term of this Contract, including any amendments or extensions hereto. Breach of any of these provisions shall be deemed a material breach which shall entitle the City to immediately terminate this Contract pursuant to Section 8.26.3 and to take any other remedial action authorized by law.

9.0 REQUIRED FORMS & DOCUMENTATION

9.1 Required Forms

9.1.1 RFP Cover Sheet

RFP COVER SHEET

Worcester Public Schools
City of Worcester
REQUEST FOR PROPOSAL

<p>Proposal Number: 7445-W1</p> <p>Proposal Title: Student Information System Acquisition and Implementation</p> <p>Due Date: Wednesday, September 30, 2020</p> <p>Prior to: 10:00 a.m. EDT</p>

Sealed bids/Proposals will be received in accordance with the attached specifications. The sealed envelope containing your bid/Proposal should be plainly marked with the bid/Proposal title, number, and opening date and time. Bids/Proposals are publicly opened. You are invited to attend. **PLEASE NOTE: Late bids/Proposals will not be accepted.**

Mail or deliver complete bid/Proposal package to:

Christopher J. Gagliastro, MCPPO
City of Worcester
Purchasing Agent
Room 201 City Hall, 455 Main Street
Worcester, Mass. 01608-1895
Email address: gagliastroc@worcesterma.gov
Telephone: 508-799-1220

BIDDER/PROPOSER IDENTIFICATION: (Please print information clearly.)

Firm Name: _____	Date: _____
Address: _____	Phone: _____
_____	Fax: _____
City/St/Zip: _____	Email: _____

You MUST sign the Bid/Proposal Response Form in order for your bid/Proposal to be accepted.

9.1.2 Drug Free Workplace Certification

DRUG FREE WORKPLACE CERTIFICATION FORM

In accordance with Massachusetts Statute, preference shall be given to businesses with drug-free workplace programs. Whenever two or more proposals are equal with respect to price, quality and service are received by the State or by any political subdivision for the procurement of commodities or contractual services; a proposal received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie proposals will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs and penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under contract a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1) notify employees that as a condition of working on the commodities or contractual services that are under contract, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo-contendere to, any violation of Federal Law or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Vendor's Signature

9.1.3 Debarment or Suspension Certification Form

DEBARMENT OR SUSPENSION CERTIFICATION FORM

Debarment and Suspension —Debarment may occur, by the federal government or the state, when there is evidence of improper conduct, including, but not limited to, fraud, collusion, attempts to improperly influence a bid process or indictment by the bidder/contractor. A contract award must not be made to parties debarred, suspended, or otherwise excluded by Federal agencies.

By submitting this offer and signing this certificate, this Proposer:

- (1) Certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

Firm's Name: _____

Address: _____

City/State/Zip: _____

Telephone: _____

Authorized Company Official's Name: _____

(Typed or printed)

Title of Authorized Representative: _____

(Typed or printed)

Signature of Authorized Company Official: _____ Date Signed: _____

9.1.4 Affidavit of Non-Collusion

AFFIDAVIT OF NON-COLLUSION

It shall be understood that any bid submitted to the City is made without collusion with any other bidder submitting a bid on the same commodity/service, and is in all respects fair and without fraud.

STATE OF: _____ Date: _____

COUNTY OF: _____ S.S.: _____

The undersigned being duly sworn, deposes and says that he/she is the

(Sole Owner; Partner, President, Treasurer,
or Other Duty Authorized Official of a Corporation)

of _____ (Name
of Firm as Appearing in Submitted Proposal)

and works in _____
(City/Town)

and certifies under penalties of perjury that this proposal is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this paragraph the word "person" shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.

(Signature and Title of Person Making Affidavit)

Sworn to before me this _____ day of _____, 20 ____

Notary Public: _____ My commission expires: _____

9.1.5 CORI Compliance
(form is available on the City of Worcester Procurement website)

9.1.6 EPP Policy
(form is available on the City of Worcester Procurement website)

9.1.7 MWBE Program
(form is available on the City of Worcester Procurement website)

9.1.8 REAP Program
(form is available on the City of Worcester Procurement website)

9.1.9 WAGE Theft Prevention Certification
(form is available on the City of Worcester Procurement website)

9.2 Requested Documentation

Respondents are asked to provide the City of Worcester and its Public Schools with a compendium of documentation and written policies in addition to the forms provided in Section 9.1. This additional documentation will assist the City of Worcester and its Public Schools in evaluating the respondents.

9.2.1 Certificate of Insurance

Provide the City of Worcester with a Certificate of Insurance demonstrating that your firm's coverage meets and/or exceeds the coverage requirements detailed herein. Please name the City of Worcester as the certificate holder.

9.2.2 Audited Financials (3 years)

Provide the City of Worcester and its Public Schools with three (3) years of audited financial statements.

9.2.3 Written policy regarding sexual harassment

Provide the City of Worcester and its Public Schools with your firm's written policy regarding sexual harassment.

9.2.4 Written policy regarding non-discriminatory hiring processes

Provide the City of Worcester and its Public Schools with your firm's written policy regarding non-discriminatory hiring processes.

9.2.5 Written policy regarding FERPA, HIPPA, COPPA compliance

Provide the City of Worcester and its Public Schools with your firm's written policy regarding adherence to FERPA, HIPPA, and COPPA. Moreover, please share any policies that your organization has pertaining to Student Data Privacy and Security.

**ATTACHMENT A: MASTER ADDRESS REPOSITORY (MAR) API
DOCUMENTATION**

(See Separate PDF Document)

Master Address Repository API Documentation

RGAGEO

Appendix D

Training Table Templates from Section 4.13 of the SIS RFP

For each job role in the following table (Table 4-3), please list the subject area modules recommended by job category and include this table in your proposal.

Table 4-3: Summary of SIS End-User Training Requirements by Job Responsibility

Staff Group	Data Responsibilities	Training Needs
District-level Administrators	<ul style="list-style-type: none"> • View all student data 	<ul style="list-style-type: none"> • (list training modules) • • •
School-level Administrators	<ul style="list-style-type: none"> • View all school-level student data 	<ul style="list-style-type: none"> • (list training modules) • • •
Teachers	<ul style="list-style-type: none"> • View role-based student data • Schedules (view) • Discipline (view) • Attendance (update) • Grades (update) • Special Programs (view) • Demographics (view) • Academic History (view) 	<ul style="list-style-type: none"> • (list training modules) • • •
Clerical Staff	<ul style="list-style-type: none"> • Update all student data 	<ul style="list-style-type: none"> • (list training modules) • • •
Special Education Staff	<ul style="list-style-type: none"> • Schedules (view) • Discipline (view) • Attendance (view) • Special Programs (update) • Grades (view) • Demographics (view) • Academic History 	<ul style="list-style-type: none"> • (list training modules) • • •
Guidance Staff	<ul style="list-style-type: none"> • Schedules (update) • Discipline (view) • Attendance (view) • Enrollment (view) • Grades (view) • Demographics (view) 	<ul style="list-style-type: none"> • (list training modules) • • •
Health Staff	<ul style="list-style-type: none"> • Health (update) • Immunizations (update) 	<ul style="list-style-type: none"> • (list training modules) • • •

Staff Group	Data Responsibilities	Training Needs
Directors	<ul style="list-style-type: none"> Schedules (view) Discipline (view) Attendance (view) Enrollment (view) Demographics (view) 	<ul style="list-style-type: none"> (list training modules)
EL/RtI Staff	<ul style="list-style-type: none"> Schedules (view) Discipline (view) Attendance (view) Special Programs (update) Grades (view) Demographics (view) Academic History (view) 	<ul style="list-style-type: none"> (list training modules)
District IT Staff	<ul style="list-style-type: none"> Power user System functionality Update all student data Technical support 	<ul style="list-style-type: none"> (list training modules)
Parents/Students	<ul style="list-style-type: none"> Parent Portal Student Portal 	<ul style="list-style-type: none"> (list training modules)

The following table should be used as a template to list your company’s SIS training module syllabi. In your proposal, include a separate table for each of your company’s training modules.

Table 4-4: SIS Training Syllabus Template

Student Information System Module Name	
<p><i>Learning Objectives:</i> Enter the major learning competencies for this training module.</p>	
<p><i>Topics/competencies include:</i> List major topics/competencies covered in this module</p>	<p><i>Type:</i> Core or Optional Course</p> <p><i>Prerequisite:</i> List any prerequisites</p> <p><i>Delivery:</i> Type of training delivery</p> <p><i>Class Size:</i> List the class size</p> <p><i>Audience:</i> List all District/school job roles that should take this course module.</p> <p><i>Length of Class:</i> List the length of the class in hours</p>

Vendors should summarize their overall training requirements using Table 4-7: SIS District Training Summary Table and place the table in their response to this RFP. The data in this table will also appear in Appendix B: Total Cost Summary Forms 4 Student Information System Training Services as well.

Table 4-7: SIS District Training Summary Table

Student Information System Training Services	No. of District Staff	Length of Training Course or Module in Hours	Total Training Hours Required
SIS Modules to be trained:			
• SIS System Navigation	2900		
• General Student Information	2900		
• Registration	2563		
• Student Scheduling	314		
• Attendance	2603		
• Discipline	2603		
• Grade Reporting	2426		
• Academic History	428		
• Teacher Gradebook/Portal	2379		
• Special Programs	464		
• Master Scheduling	151		
• Report Creation	535		
• Assessment Testing	308		
• Parent/Student Portal	2379		
• Health	254		
• State Reporting	31		
SIS Entire Staff Option Total:	2900		
• SIS Train-the-Trainer Option	40		
• Certification Classes and Exams	40		
SIS Train-the-Trainer Option Total:	40		
Hybrid Option Total:	190		
• Train-the-Trainer Staff	40		
• 5% Power Users	150		

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Services Overview

A library of services is provided to communicate with the Worcester Master Address Repository. This document contains details about those services.

Each service is accessed using the URL provided. In the examples below a local host is used; however, the published name will be provided at the time of integration. It is up to the end user to consume the restful JSON services. A sample application using HTML5 and Java script will be provided to show how to consume the services within the library.

Available Services

Operations at <http://gismar1/MARServices/Address.svc/REST>

This page describes the service operations at this endpoint.

Uri	Method	Description
GetAddressJSON	GET	This is an address search service. The user can pass in any of the following Address prefix, Number, Suffix, Street Name, Subaddress Type, Subaddress ID, City, State, Zip, or LifeCycle Status. This service returns a list of addresses using LIKE information provided in a JSON format.
GetAddressLocationalJSON	GET	This is a location service that returns the longitude, latitude and elevation. Pass in any of the following Address prefix, Number, Suffix, Street Name, Subaddress Type, Subaddress ID, City, State, Zip, or LifeCycle Status. This service returns a list of addresses using LIKE information provides longitude, latitude and elevation in a JSON format. It is primarily used as a locational service for mapping projects.
GetCompleteSubaddressFromIDJSON	GET	This service allows applications to retrieve the address using the CompleteSubaddress.ID value. Pass in the CompleteSubaddress.ID value and the Address prefix, Number, Suffix, Street Name, Subaddress Type, Subaddress ID, City, State, Zip, and LifeCycle Status are returned. This service returns a list of addresses using LIKE information provides CompleteSubaddressID in a JSON format.
GetCompleteSubaddressFromUUIDJSON	GET	This service allows applications to retrieve the unique AddressUUID using the CompleteSubaddress.AddressUUID value. Pass in the CompleteSubaddress.AddressUUID value and the Address prefix, Number, Suffix, Street Name, Subaddress Type, Subaddress ID, City, State, Zip, and LifeCycle Status are returned. This service returns a list of addresses using LIKE information provides CompleteSubaddressUUID in a JSON format.
GetCompleteSubaddressIDJSON	GET	This service allows applications to store the CompleteSubaddressID as a unique foreign key. Pass in any of the following Address prefix, Number, Suffix, Street Name, Subaddress Type, Subaddress ID, City, State, Zip, or LifeCycle Status. This service returns a list of addresses using LIKE information provides CompleteSubaddressID in a JSON format.
GetCompleteSubaddressUUIDJSON	GET	This service allows applications to store the CompleteSubaddressUUID as a unique foreign key. Pass in any of the following Address prefix, Number, Suffix, Street Name, Subaddress Type, Subaddress ID, City, State, Zip, or LifeCycle Status. This service returns a list of addresses using LIKE information provides CompleteSubaddressUUID in a JSON format.
ServiceHealth	GET	Call this service to confirm Service health. Service will return some text in JSON format.

Service Use

A call to the service GetAddressJSON would look like the call below:

<http://gismar1/MARServices/Address.svc/REST/GetAddressJSON?AddressNumberPrefix={ADDRESSNUMBERPREFIX}&AddressNumber={ADDRESSNUMBER}&AddressNumberSuffix={ADDRESSNUMBERSUFFIX}&CompleteStreetName={COMPLETESTREETNAME}&SubaddressType={SUBADDRESSTYPE}&SubaddressIdentifier={SUBADDRESSIDENTIFIER}&City={CITY}&State={STATE}&Zipcode={ZIPCODE}&Status={STATUS}>

In the example below the GetAddressJSON service is used. All the input parameters are provided. Notice the AddressNumber=100 and the CompleteStreetName=CAP. A call to the service using the syntax below will return all addresses using the address number 100 and the street name contains the string "CAP".

<http://servername/Address.svc/rest/GetAddressJSN?AddressNumberPrefix=&AddressNumber=100&AddressNumberSuffix=&CompleteStreetName=CAP&SubaddressType=&SubaddressIdentifier=&City=&State=&Zipcode=&Status=>

Service Descriptions

GetAddressJSN

This is an address search service. The user can pass in any of the following: Address Prefix, Address Number, Address Suffix, Street Name, Subaddress Type, Subaddress Identifier, City, State, Zip, or Life Cycle Status. The service returns a list of addresses using LIKE information provided in a JSON format.

Url:

`http://gismar1/MARServices/Address.svc/REST/GetAddressJSN?AddressNumberPrefix={ADDRESSNUMBERPREFIX}&AddressNumber={ADDRESSNUMBER}&AddressNumberSuffix={ADDRESSNUMBERSUFFIX}&CompleteStreetName={COMPLETESTREETNAME}&SubaddressType={SUBADDRESSTYPE}&SubaddressIdentifier={SUBADDRESSIDENTIFIER}&City={CITY}&State={STATE}&Zipcode={ZIPCODE}&Status={STATUS}`

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

- AddressNumberPrefix – Optional value
- AddressNumber - Required
- AddressNumberSuffix - Optional value
- CompleteStreetName – Required uses Like statement
- SubaddressType - Optional value
- SubaddressIdentifier - Optional value
- City - Optional value
- State - Optional value
- ZipCode – Optional value
- Status - Optional (Active, Potential, Retired)

Sample call:

<http://gismar1/MARServices/Address.svc/REST/GetAddressJSN?AddressNumberPrefix=&AddressNumber=100&AddressNumberSuffix=&CompleteStreetName=CAP&SubaddressType=&SubaddressIdentifier=&City=&State=&Zipcode=&Status=>

JSN Return:

All addresses matching the search criteria provided.
Example: 100 Capcom Ave Wake Forest NC 27587 Active
100 Capetree Ln Garner NC 27529 Active

GetLocationalJSN

This is a location service that returns the longitude, latitude, and elevation of an address. The user can pass in any of the following: Address Prefix, Address Number, Address Suffix, Street Name, Subaddress Type, Subaddress Identifier, City, State, Zip, or Life Cycle Status. The service returns a list of addresses using LIKE information in a JSON format. It is primarily used as a locational service for mapping projects.

Url:

<http://gismar1/MARServices/Address.svc/REST/GetAddressLocationalJSN?AddressNumberPrefix={ADDRESSNUMBERPREFIX}&AddressNumber={ADDRESSNUMBER}&AddressNumberSuffix={ADDRESSNUMBERSUFFIX}&CompleteStreetName={COMPLETESTREETNAME}&SubaddressType={SUBADDRESSTYPE}&SubaddressIdentifier={SUBADDRESSIDENTIFIER}&City={CITY}&State={STATE}&Zipcode={ZIPCODE}&Status={STATUS}>

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

AddressNumberPrefix - Optional value
AddressNumber - Required
AddressNumberSuffix - Optional value
CompleteStreetName – Required uses Like statement
SubaddressType - Optional value
SubaddressIdentifier - Optional value
City - Optional value
State - Optional value
ZipCode – Optional value
Status - Optional value (Active, Potential, Retired)

Sample call:

<http://gismar1/MARServices/Address.svc/REST/GetLocationalJSN?AddressNumberPrefix=&AddressNumber=200&AddressNumberSuffix=&CompleteStreetName=Buncom&SubaddressType=&SubaddressIdentifier=&City=&State=&Zipcode=&Status=>

JSN Return:

All the input parameters are returned along with the Longitude, Latitude and Elevation matching the search criteria provided.

Example: 200 Buncombe St Raleigh NC 27609 Active -78.6635118884737 35.8321002069593 -999

GetCompleteSubaddressIDJSN

This is an address search service. The user can pass in any of the following: Address Prefix, Address Number, Address Suffix, Street Name, Subaddress Type, Subaddress Identifier, City, State, Zip, or Life Cycle Status. The service returns a list of addresses with their unique Complete Subaddress ID using LIKE information provided in a JSON format. The purpose of this service is to allow business partners to store the unique integer for the address in the MAR.

Url:

`http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressIDJSN?AddressNumberPrefix={ADDRESSNUMBERPREFIX}&AddressNumber={ADDRESSNUMBER}&AddressNumberSuffix={ADDRESSNUMBERSUFFIX}&CompleteStreetName={COMPLETESTREETNAME}&SubaddressType={SUBADDRESSTYPE}&SubaddressIdentifier={SUBADDRESSIDENTIFIER}&City={CITY}&State={STATE}&Zipcode={ZIPCODE}&Status={STATUS}`

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

AddressNumberPrefix - Optional value
AddressNumber - Required
AddressNumberSuffix - Optional value
CompleteStreetName – Required uses Like statement
SubaddressType - Optional value
SubaddressIdentifier - Optional value
City - Optional value
State - Optional value
ZipCode – Optional value
Status - Optional value (Active, Potential, Retired)

Sample call:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressIDJSN?AddressNumberPrefix=&AddressNumber=200&AddressNumberSuffix=&CompleteStreetName=Buncom&SubaddressType=&SubaddressIdentifier=&City=&State=&Zipcode=&Status=>

JSN Return:

All addresses and Complete Subaddress ID unique integer matching the search criteria provided.
Example: 200 Buncombe St Raleigh NC 27609 Active 2786461

GetCompleteSubaddressFromIDJSN

This is a unique address search service. The user can pass in the Complete Subaddress ID and the service returns the address associated to the matching unique Complete Subaddress ID in a JSON format. The purpose of this service is to allow business partners to search for an address using the unique identifier.

URL:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressFromIDJSN?CompleteSubaddressID={COMPLETESUBADDRESSID}>

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

CompleteSubaddressID - Required

Sample call:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressFromIDJSN?CompleteSubaddressID=2786461>

JSN Return:

AddressNumberPrefix
AddressNumber
AddressNumberSuffix
CompleteStreetName
SubaddressType
SubaddressIdentifier
City
State
ZipCode
Status

Example: 200 Buncombe St Raleigh NC 27609 Active

GetCompleteSubaddressUUIDJSN

This is an address search service. The user can pass in any of the following: Address Prefix, Address Number, Address Suffix, Street Name, Subaddress Type, Subaddress Identifier, City, State, Zip, or Life Cycle Status. The service returns a list of addresses with their unique Complete Subaddress AddressUUID using LIKE information provided in a JSON format. The purpose of this service is to allow business partners to store the unique GUID identifier for the address.

Url:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressUUIDJSN?AddressNumberPrefix={ADDRESSNUMBERPREFIX}&AddressNumber={ADDRESSNUMBER}&AddressNumberSuffix={ADDRESSNUMBERSUFFIX}&CompleteStreetName={COMPLETESTREETNAME}&SubaddressType={SUBADDRESSTYPE}&SubaddressIdentifier={SUBADDRESSIDENTIFIER}&City={CITY}&State={STATE}&Zipcode={ZIPCODE}&Status={STATUS}>

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

AddressNumberPrefix - Optional

AddressNumber - Required

AddressNumberSuffix - Optional

CompleteStreetName – Required uses Like statement

SubaddressType - Optional

SubaddressIdentifier - Optional

City - Optional

State - Optional

ZipCode – Optional

Status - Optional (Active, Potential, Retired)

Sample call:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressUUIDJSN?AddressNumberPrefix=&AddressNumber=100&AddressNumberSuffix=&CompleteStreetName=Cap&SubaddressType=&SubaddressIdentifier=&City=&State=&Zipcode=&Status=>

JSN Return:

All addresses and their unique UUID string matching the search criteria provided.

Example: 100 Capcom Ave Wake Forest NC 27587 Active 6FD77E23-BCBE-431C-96A7-F839D53642DE
100 Capetree Ln Garner NC 27529 Active 00DFEBC2-992D-4BD6-B81C-8836FF61FA52

GetCompleteSubaddressFromUUIDJSN

This is a unique address search service. The user can pass in the Complete Subaddress UUID and the service returns the address associated to the matching unique Complete Subaddress UUID in a JSON format. The purpose of this service is to allow business partners to search for or store the unique GUID identifier.

URL:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressFromUUIDJSN?CompleteSubaddressUUID={COMPLETESUBADDRESSUUID}>

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

CompleteSubaddressUUID – Required

Sample Call:

<http://gismar1/MARServices/Address.svc/REST/GetCompleteSubaddressFromUUIDJSN?CompleteSubaddressUUID=AB189FB0-669F-480C-BC53-E8E9E25FE8C0>

JSN Return:

AddressNumberPrefix
AddressNumber
AddressNumberSuffix
CompleteStreetName
SubaddressType
SubaddressIdentifier
City
State
ZipCode
Status

Example: 200 Buncombe St Raleigh NC 27609 Active

ServiceHealth

This is a service used to confirm the current operating state, or health, of the services. The purpose of this service is to allow all end users the ability to determine whether the IIS server is operating. The service will return text in JSON format. If the service is unavailable, nothing is returned.

URL: <http://gismar1/MARServices/Address.svc/REST/ServiceHealth>

HTTP Method: GET

This operation supports JSONP responses. The callback function can be specified using the "callback" URL query parameter.

Message direction	Format	Body
Request	N/A	The Request body is empty.
Response	Unknown	Cannot infer schema. The Response body is wrapped.

Input parameters:

NA

Sample Call:

<http://gismar1/MARServices/Address.svc/REST/ServiceHealth>

JSN Return:

Success