

PLEASANT HILL R-III SCHOOL DISTRICT

318 Cedar St. Pleasant Hill, MO 64080

Phone: 816-540-3161

www.phr3.org

**REQUEST FOR PROPOSAL: RFP Student Information System**

Pleasant Hill R-III School District (PHR3) is soliciting competitive proposals from IT solutions providers for a student information system, complying with all terms and conditions described in this document.

Proposals will be accepted by 5:00 p.m. CST, September 6, 2024. Proposals received after this time will not be accepted.

Documents can be delivered (sealed), mailed, or emailed with subject: **RFP SIS**. Mail or deliver all proposals and accessory documents to:

**Pleasant Hill School District**

**Attn: Jim Schlichting**

**318 Cedar St.**

**Pleasant Hill, MO 64080**

Proposals must be manually signed on this PHR3 Form in the space provided below.

Please submit **a PDF Document emailed to jschlichting@phr3.org**

PHR3 reserves the right to accept or reject proposals and to award a contract in the district’s best interests.

I have read the terms and conditions of this RFP and submit for consideration the attached proposal and exhibits, if any.

The fees and costs in this proposal have been arrived at independently and have not been divulged, discussed, or compared with other vendors.

By signing below, Proposer agrees to the district policies for Request for Proposals.

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Company Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Address

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Telephone Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Fax Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Name

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Phone Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized Name and Title

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized Signature and Title

**1.0 REQUEST FOR PROPOSAL OVERVIEW**

Project Name: Student Information System

RFP Release Date: **August 23, 2024**

RFP Due Date: **September 6, 2024**

* 1. **Scope of Services Sought**

**REQUESTED SERVICES**

The Request for Proposal (“RFP”) issued by Pleasant Hill R-III School District (PHR3) is to acquire proposals from qualified firms to provide a student information system. This project

requires the migration of Common Goal Systems Inc. School Insight SIS (TeacherEase) data to the new system. The school information system (SIS) must be fully migrated and operational for the start of the **2025 fall school** session. Scheduling for the next school year will need to begin in **December 2024**.

**Student Information System required modules and features:**

* Student Records
* Demographics
* Document Management
* Assessment Data and Imports
* Grade Book
* Grading / Transcripts, eTranscripts, Report Cards (Traditional and Standards Aligned)
* Custom Forms
* Special Education IEPs
* Custom Learner Plans and Forms
* Multi-Year Academic Planner
* Online Course Registration
* Course Management
* Scheduling
* Enrollment
* Activities
* Eligibility
* Surveys
* Attendance (Daily, ½ Day, Period)
* Behavior (Positive / Negative)
* Fees
* Online Payments
* Locker Management
* Transportation
* Health (Immunizations, Medications, Office Visits)
* Ad Hoc Reporting Tools (Data Viewer, Filter Designer, Data Analysis, and Data Export)
* Parent / Student Portal
* Free/Reduced Application Management
* National Records Exchange
* Data Warehouse
* One-Roster Standard Files
* One Roster Standard API
* Ed-Fi API
* SIF Agent (Schools Interoperability Framework)
* Zone Integration Server (ZIS)
* Email Messenger
* Missouri State Reports
* Cloud Hosting Service
* Nightly Backup of district data to a remote site.
* Online Registration
* Food Service Point of Sale
* Software Support
	+ Support must be available 24/7 and 365 days a year.
	+ Support MUST be billed annually in a 12-month package and include unlimited support hours. The district will reject any bid that limits annual support.
	+ Telephone support (e.g., include toll-free support hotline, hours of operation, availability of 24 x 7 hotline. Etc.).
	+ Special plans defining “levels” of customer support (e.g., gold, silver, etc.). Define what level of support is being proposed.
	+ Delivery method of future upgrades and product enhancements, including historical frequency of upgrades by module.
	+ Availability of education user groups and their geographic areas.
	+ Problem reporting and resolution procedures.
	+ Bug fixes and patches.
	+ Other support (e.g., on-site, remote, Web site access to patches, fixes, and knowledge base).
* Ongoing Learning/Training Plans for Employees
* Google Single Sign-On

**Data Migration from Common Goal Systems Inc. School Insight SIS (Teacherease)**

* Describe the process for designing a data conversion plan to migrate the district’s historical data from Teacherease, ensuring the integrity and accuracy of that data. The district maintains historical data for student academic-related records and demographics. Responses will detail the proposer’s expectations of the activities that District personnel and the proposer will be expected to perform with regard to data conversion. Proposers will detail their experience with data conversion, especially the main types of databases and student information systems for which they have successfully completed conversions. Proposers will describe how they will approach the main systems’ conversion and their methodology for managing the required conversions.
* Include all costs that will be required to migrate data from our existing system, Teacherease, such as:
* Data Conversion
* Implementation Management
* Training
* **Data conversion must include the last five school years, including summer school. Please include a data conversion option to convert additional years. District file sets in Teacherease go back 12 academic years for all students (Kindergarten – 12th Grade). The district does have an on-site presence of Tyler SIS that was suspended for the start of the 23-24 school year. This was in use from 2010-11 to the transition to TeacherEase.**

**Implementation Plan**

* Detailed methodology for implementing software. The methodology shall

include an estimated timeframe, overview of phases and milestones, assumptions, and responsibilities.

* Detailed methodology for implementing third-party software. The methodology shall include an estimated timeframe, an overview of phases and milestones, assumptions, and assumed responsibilities.
* Explain how each of the following types of testing has been addressed in your implementation plan: (a) module testing; (b) integration testing; (c) parallel testing, and (d) stress/load testing
* Work effort estimates. A "staff loading" chart listing resource utilization by each month will be included. Include names, titles, and resumes of implementers likely to be assigned to this project. Work effort estimates must match the assumptions presented in the cost schedule and the assumptions presented in the implementation methodology. After further discussion with the proposer, the district reserves the right to alter work effort estimates.
* Staffing. The proposer will give the district reasonable rights to approve or disapprove personnel and personnel changes during the term of any agreement.
* Anticipated District support staff levels. The proposer will identify the expected IT staffing levels to support the ongoing operations of the proposed system. This will be verified with proposer references.

**Training Plan - The District is interested in utilizing a “train the trainer” with proposer support training plan. The proposer must provide a detailed plan for training. This information MUST include:**

* Overview of proposed training plan/strategy, including options for on-site or off-site training services, for the core project team, end-users, and technology personnel.
* The proposer's role and responsibility in designing and implementing the training plan (e.g., developing customized training materials and delivering training to the district).
* The role and responsibility of district staff in the design and implementation of the training plan.
* The knowledge transfer strategy proposed by the proposer to prepare district staff to maintain the system after it is placed into production.
* Descriptions of Classes/Courses and training materials proposed in the training plan. (The proposer will specify the unit of measure for its training (e.g., units, classes, days, etc.) and define the hours associated with these units of measure.) The proposer must be very clear about what training courses are included in the proposal's cost.
	1. **DATA PRIVACY**
* The Proposer agrees to abide by and maintain adequate data security measures, consistent with industry standards and technology best practices, to protect Student Data from unauthorized disclosure or acquisition by an unauthorized person. The general security duties of the Proposer are set forth below. These measures shall include, but are not limited to:
	+ **Passwords and Employee Access**. The Proposer shall secure usernames, passwords, and any other means of gaining access to the Services or to Student Data at a level suggested by the applicable standards. Proposer shall only provide access to Student Data to employees or contractors performing the Services. Employees with access to Student Data shall have signed confidentiality agreements regarding said Student Data. All employees with access to Student Records shall be subject to criminal background checks in compliance with state and local ordinances.
	+ **Destruction of Data.** Proposer shall destroy or delete all Student Data obtained under the Service Agreement when it is no longer needed for the purpose it was obtained, or transfer said data to LEA or LEA's designee. Nothing in the Service Agreement authorizes the Proposer to maintain Student Data beyond the period reasonably needed to complete the disposition.
	+ **Employee Training.** The Proposer shall provide periodic security training to its employees who operate or have access to the system. Further, the Proposer shall provide LEA with the contact information of an employee whom LEA may contact if there are any security concerns or questions.
	+ **Security Technology.** When the service is accessed using a supported web browser, the Proposer shall employ industry standard measures to protect data from unauthorized access. The service security measures shall include server authentication and data encryption. Proposer shall host data pursuant to the Service Agreement in an environment using a firewall that is updated according to industry standards.
	+ **Periodic Risk Assessment.** The Proposer further acknowledges and agrees to conduct digital and physical periodic (no less than semi-annual) risk assessments and remediate any identified security and privacy vulnerabilities in a timely manner.
* **Data Breach**. In the event that Student Data is accessed or obtained by an unauthorized individual, the Proposer shall provide notification to LEA within a reasonable amount of time of the incident not exceeding forty-eight (48) hours. Proposer shall follow the following process:
	+ The security breach notification shall be written in plain language, shall be titled "Notice of Data Breach," and shall present the information described herein under the following headings: "What Happened," "What Information Was Involved," "What We Are Doing," "What You Can Do," and "For More Information." Additional information may be provided as a supplement to the notice.
	+ The security breach notification described above shall include, at a minimum, the following information:
		- The name and contact information of the reporting LEA subject to this section.
		- A list of the types of personal information that were or are reasonably believed to have been the subject of a breach.
		- If the information is possible to determine at the time the notice is provided, then either (1) the date of the breach, (2) the estimated date of the breach, or (3) the date range within which the breach occurred. The notification shall also include the date of the notice.
		- Whether the notification was delayed due to a law enforcement investigation if that information is possible to determine at the time the notice is provided.
		- A general description of the breach incident, if that information is possible to determine at the time the notice is provided.
		- Information about the agency’s actions to protect individuals whose information has been breached.
		- Advice on steps that the person whose information has been breached may take to protect himself or herself.
	+ Proposer agrees to adhere to all requirements in applicable State and federal law concerning a data breach related to the Student Data, including, when appropriate or required, the required responsibilities and procedures for notification and mitigation of any such data breach.
	+ Proposer further acknowledges and agrees to have a written incident response plan that reflects best practices and is consistent with industry standards and federal and state law for responding to a data breach, breach of security, privacy incident, or unauthorized acquisition or use of Student Data or any portion thereof, including personally identifiable information and agrees to provide LEA, upon request, with a copy of the said written incident response plan.
	+ Proposer is prohibited from directly contacting parent, legal guardian, or eligible pupil unless expressly requested by LEA. If LEA requests Proposer's assistance in providing notice of unauthorized access, and such assistance is not unduly burdensome to Proposer, Proposer shall notify the affected parent, legal guardian, or eligible pupil of the unauthorized access, which shall include the information listed in subsections above. If requested by LEA, Proposer shall reimburse LEA for costs incurred to notify parents/families of a breach not originating from LEA's use of the Service.
	+ In the event of a breach originating from LEA's use of the Service, Proposer shall cooperate with LEA to the extent necessary to expeditiously secure Student Data.
* The Proposer agrees that all products and services comply with all applicable state and federal requirements, including all state and federal laws.
* The Proposer has signed and agreed to the Vendor Data Protection Agreement attached to the RFP.
* The Proposer has signed and agreed to the Student Data Privacy Consortium Agreement, including Exhibit E, which can be found at <https://privacy.a4l.org/>.
* **Student Data Property of LEA**. All Student Data transmitted to the Proposer under the Service Agreement is and will continue to be the property of and under the control of the LEA. The Proposer further acknowledges and agrees that all copies of such Student Data transmitted to the Proposer, including any modifications or additions or any portion thereof from any source, are subject to the provisions of this Agreement in the same manner as the original Student Data. The Parties agree that as between them, all rights, including all intellectual property rights in and to Student Data contemplated per the Service Agreement, shall remain the exclusive property of the LEA. For the purposes of FERPA, the Proposer shall be considered a School Official, under the control and direction of the LEAs as it pertains to the use of Student Data notwithstanding the above. The Proposer may transfer pupil-generated content to a separate account according to the procedures below.
* **Parent Access.** LEA shall establish reasonable procedures by which a parent, legal guardian, or eligible student may review Student Data in the pupil's records, correct erroneous information, and procedures for the transfer of pupil-generated content to a personal account, consistent with the functionality of services. Proposer shall respond promptly (and no later than 45 days from the date of the request) to the LEA's request for Student Data in a pupil's records held by the Proposer to view or correct as necessary. In the event that a parent of a pupil or other individual contacts the Proposer to review any of the Student Data accessed pursuant to the Services, the Proposer shall refer the parent or individual to the LEA, who will follow the necessary and proper procedures regarding the requested information.
* **Separate Account.** Proposer shall, at the request of the LEA, transfer pupil-generated content to a separate student account upon termination of the Service Agreement; Such transfer shall only apply to pupil-generated content that is severable from the Service.
* **Third Party Request.** Should a Third Party, including law enforcement and government entities, contact the Proposer with a request for data held by the Proposer pursuant to the Services, the Proposer shall redirect the Third Party to request the data directly from the LEA. Proposer shall notify the LEA in advance of a compelled disclosure to a Third Party.

**2.0 ABOUT PLEASANT HILL R-III SCHOOL DISTRICT**

For a full description of PHR3, its mission, demographics, andvision can be found at https://www.phr3.org.

**3.0 INSTRUCTIONS TO THE VENDOR**

**3.1 Communication/Questions**

Vendors are expected to immediately raise any questions or additions concerning the RFP document. Any questions or requests for clarifications can be directed in writing to jschlichting@phr3.org. The email’s subject line must be labeled “RFP SIS – Question.” As stated above, the only contact allowed with the PHR3 staff is jschlichting@phr3.org.

**3.2 Calendar of Events**

The dates set forth below are for informational purposes only. All dates are tentative and subject to change.

Issue RFP: **August 23, 2024**

Proposal Due Date: **September 6, 2024**

**3.3 Submission of the Response**

The respondent can submit a sealed paper copy of the proposal in person or via mail. One digital PDF copy via email must be sent prior to the deadline. Mailed or deliver copies can be sent to:

**Pleasant Hill School District**

**Attn: Jim Schlichting**

**318 Cedar St.**

**Pleasant Hill, MO 64080**

Proposals will be accepted no later than **September 6, 2024**. Proposals received after this time will not be accepted. **The district will receive all bids sent via mail, in-person (sealed bid), or email.**

**Evaluation Criteria**

A Pleasant Hill School District evaluation committee will be established to assess the vendor’s response to each RFP requirement. Proposals should be complete on their face. However, after opening the responses, PHR3 reserves the right to waive irregularities in any proposal and/or to request clarifying information it deems appropriate from one or more respondents. Proposals will be evaluated based on the following criteria using a scoring rubric:

* Cost pricing of proposed services
* Qualifications/ Experience
* Experience in providing requested services to similar entities
* Responsiveness, clarity, completeness, and relevance of the vendor’s response
* Reference satisfaction of past customers
* Software evaluation matrix
* Ability to meet state reporting requirements

**4.0 PROPOSAL FORMAT AND CONTENT**

Responses are to be formatted and tabulated in the form and sequence described in Section 4. Responses not following the format outlined will not be considered. The evaluation and selection of a vendor will be based on the information submitted in the vendor’s response.

**4.1 Response Organization**

**SECTION 1: Signed Cover Page**

The PHR3 cover page must be signed by a vendor representative authorized tomake contractual obligations and submitted as Section 1 of the response. Pleaseinclude all contact information.

By signing the cover page, you acknowledge and accept the terms outlined in the RFP.

**SECTION 2: Vendor Qualifications and References**

Provide a brief description of the vendor, including history; the number of years the vendor has

been in business; type of services provided and legal status of vendor organization, i.e.

corporation, partnership, etc.

Include documentation to verify the proposer’s capacity of adequate financial support, assets, and organization to provide the products and services required in this RFP.

Describe successful projects or experiences comparable to the services requested in this RFP and in environments comparable or greater in size to Pleasant Hill School District.

**Vendor References**

The vendor shall provide at least three client references, including the names of the individual(s) you would propose PHR3 contact, with phone numbers, company names, addresses, organization size, implementation length, and date. **Please include Missouri clients only**.

PHR3 reserves the right to contact or visit any party listed as a reference that has previously used or is presently using your products or services like those proposed by the vendor. PHR3 also reserves the right to use other sources to obtain information about the proposed products and services.

|  |
| --- |
| **Reference #1** |
| **Organization/Customer Name** |  |
| **Name, Title & Contact information for company contact** |  |
| **Organization/Customer Size - Number of employees/students/licenses** |  |
| **Implementation length** |  |
| **Installation Date** |  |

**SECTION 3: RFP Response (Excluding Price)**

Describe how you propose to meet or exceed the scope of service outlined in section 1.1. The

section should also describe any information that PHR3 must supply and/or any other resources PHR3 must supply for the vendor to complete the required deliverables.

**SECTION 4: RFP Response (Price Information)**

Respondents should clearly state their firm's pricing structure within their proposal. All fees, charges, billing rates, etc., should be explained in detail. Explain any penalty or liability charge for order changes before and after installation of the system. Charges must be tied to deliverables, which must be identified. Payments should not be associated with the passage of time. PHR3 does not reimburse vendor out-of-pocket costs. PHR3 does not pay in advance for services. PHR3 is exempt from sales and use tax by state statute. **Please include the initial 12-month price and estimated renewal for the next school year for the core system, add-on modules, and support.**

**SECTION 5: Additional Materials, Brochures, Etc.**

Please, only include relevant and necessary information.

**EXHIBIT 1:** A software evaluation matrix is included as a part of the bid response and must be completed. The completed software evaluation matrix should be included in paper form as part of the bid response. The software evaluation matrix must also be emailed to jschlichting@phr3.org prior to the bidding deadline. The email subject line should read **“RFP-SIS Software Evaluation Matrix.”**

**EXHIBIT 2: Signed Vendor Data Protection Agreement**

Include the signed data protection agreement referenced in section 1.1.

**5.0 Award**

PHR3 reserves the right to determine which vendor, in its sole judgment, best meets the district’s needs. The district will select the lowest or best bid or offer regardless of the purchase method used. The district reserves the right to waive minor technical defects in a bid, reject any and all bids, reject any part of a bid, advertise for new bids, or make the purchase on the open market if the product or service can be obtained at a better price. If the purchase scope changes substantially, the district will rebid the product or service unless this procedure provides a suitable solution.

Notification of the award will be accomplished by posting the name of the recommended awardee on the PHR3 Website.

**6.0 Vendor Payment**

PHR3 will provide payment to the vendor after the completion of the project. The project must meet the satisfaction of the Pleasant Hill R-III School District before releasing payment.