

Request for Information No. I

RFP No. 18/19-04 Electronic Document Routing Solution

April 1, 2019

Response to Proposers' Questions

1.1 Question: We are a small & growing team, would that disqualify us right away?

Answer: Ed Tech JPA welcomes responses from vendors of various sizes. The needs of each Ed Tech JPA Member are unique, and Ed Tech JPA may make multiple awards to qualifying vendors so that members will have the option to choose a product/provider that best meet the needs of each Ed Tech JPA Member.

1.2 Question: You seem to be moving toward a digital transformation. What are you looking for in the transformation?

Answer: The Ed Tech JPA will result in a multiple award with vendors in multiple categories that will meet different Ed Tech JPA Members' needs. Each Ed Tech JPA Member can review the RFP documentation and Master Agreements to find a solution that best fits their needs.

Clovis USD is the originating District and has an immediate need for this type of product. Clovis does not require a service that specifically focuses on document signing. Clovis would like a product that effectively decreases or eliminates the need for paper forms routed throughout the district and community, such as field trip approval forms and Human Resources New Hire Forms, and that offers an organized record retention of digital documents. (Ex: A new employee completes and submits paperwork online. HR then processes paperwork and attaches a digital copy to the personnel file). These features may or may not be important to other Ed Tech JPA Members, and we therefore invite proposers to provide a comprehensive proposal that highlights all features available for the desired product.

1.3 Question: Will this will be for 2 purposes: 1) to meet Clovis's needs and 2) to create a preferred vendor list that JPA members can pick from without going through procurement process?

Answer:

1) Yes. The purpose of the JPA is to run an inclusive RFP with the purpose of identifying qualified vendors who will meet the needs of Ed Tech JPA Members, including the needs of the initiating District (Clovis). Clovis is expected to select a vendor from the prevailing vendors resulting from this RFP process.

2) This RFP is made pursuant to Public Contract Code 2118.2 and is intended to satisfies procurement requirements for all Ed Tech JPA members. Before entering into a Purchase Agreement, Ed Tech JPA Members will independently review pricing, RFP documentation, vendor information, and

the Master Agreement(s) online to ensure the procurement satisfies all local procurement rules. Members then select a vendor, and enter into a Purchase Agreement with the vendor without having to conduct a separate procurement process.

1.4 Question: Can you expand on the Form solution and EERP for other solutions that will be integrated? Web form or printed doc?

Answer: Clovis does not have an immediate need for this, but they would like to eventually having a journal entry form for the forms to interface with their financial system (Tyler Technologies).

1.5 Question: What other systems are Clovis and other districts using?

Answer: Ed Tech JPA focuses on California school districts. The number one Student Information System is Aeries, others include: Powerschool, Infinite Campus, and Sunguard. Financial systems include: Business Plus and Munis. Human Resources Systems are more diverse and include: PeopleSoft, SIP, My HR, Escape, and homegrown solutions.

Clovis uses Aeries, Munis, and Escape.

1.6 Question: Could you elaborate on the minimum price guarantee? It states that they can not sell to eligible entities of the JPA.

Answer: Ed Tech JPA wants to ensure that the contracts awarded through the JPA are competitive. The intention of the clause is that vendors offer the JPA the lowest price available, with the understanding that this may be the last RFP the vendor responds to. Ed Tech JPA asks that Vendors offer the lowest price so there is not negotiation outside the JPA undercutting the pricing offered through the JPA. Vendors should agree not to approach a California education entity with a lower price. Vendors have the ability to tier their pricing in the RFP, because Ed Tech JPA understands that cost can vary based on different criteria. Vendors can tier based on any criteria (such as license numbers, enrollment numbers, number of sites, etc.)

1.7 Question: How many vendors will you pick per category; what is the max number Ed Tech JPA will pick?

Answer: Ed Tech JPA does not have a set number of vendors that will prevail for each RFP. Vendors who meet essential requirements and provide competitive pricing, and do not have any material exceptions, will be selected as prevailing vendors.

1.8 Question: Section 3.6.2 states that the solution should not maintain its own set of users and groups. We do have group capabilities, but the way we can permission out goes beyond what LDAP allows. Especially bc there was mention of non-users access to the system.

Answer: Clovis currently allows an outside individual to access the system via a link. There may be a link to a form on the website or in an email. While Clovis doesn't have a user permission set up,

they do have a link. They do not maintain outside their network users. We will release an amendment to clarify the intent of the requirement to allow access without authentication.

If vendors have an alternative to an essential requirement that meets the objective of the requirement please include details to the alternative and why vendor believes this should be a viable work around.

1.9 Question: Have there been previous waves of RFPs that have gone out? Do you anticipate adding other vendors on the the JPA offering?

Answer: Ed Tech JPA has completed RFP No. 18/19-01 Nutrition Management Solution Platform and is currently in contract negotiations with prevailing vendors. Ed Tech JPA currently has two additional open RFPs: RFP No. 18/19-02 Notification System Platform, and RFP No. 18/19-03 Learning Management Solution Platform. These are the RFPs referred to when Ed Tech JPA references additional RFPs, not RFPs for these same electronic document routing services. Ed Tech JPA has 15-20 RFPs scheduled for this year so it can make many products available to members and generate interest from districts.

1.10 Question: Do we have a list of current JPA Members?

Answer: Currently JPA membership is limited to its founding members: Clovis Unified School District, Irvine Unified School District, Capistrano Unified School District, and Fullerton School District, with a combined total of approximately 115,000 students. The Ed Tech JPA was discussed at the most recent Orange County IT Directors Meeting (Orange County has approximately 500,000 students) and approximately 80% of those present expressed interest in joining. Associate Membership will become available in May. Currently Ed Tech JPA Members represent the needs of approximately 115,000 students, and this number will increase exponentially when Associate Membership becomes available next month.

1.11 Question: Please elaborate on the administrative fee.

Answer: There is a 4% administrative fee. The intent of the administrative fee is to cover the JPA's operating costs. There are significant administrative costs, legal costs, and staff time incurred in the development of the structure and procedures of Ed Tech JPA and for each RFP run by Ed Tech JPA. As a result of Ed Tech JPA school districts do not have to run their own RFPs, and vendors have less RFPs to respond to, resulting in lower costs and less staff time spent running and responding to RFPs. Some school districts may not have sufficient staff to run necessary RFPs, and Ed Tech JPA will enable them to abide by procurement laws without a burden to their staff.

Vendors will enter into a Purchase Agreement based on the general terms and conditions of the Master Agreement between the vendor and Ed Tech JPA. Vendors will provide quarterly reports and a check for the administrative fee to Ed Tech JPA. These will be submitted to Clovis USD, Ed Tech JPA's administrative unit.

1.12 Question: Is there are indication on whether the other current participating members are in the exploratory phase as well for those solutions?

Answer: Clovis USD has an immediate need for this product. Two of the other three members are interested in this type of product, but not committed to purchasing in the near future. These districts will be evaluating responses to the RFP and district needs.