

Request for Proposal

Student Information System

Regardless of terminology, the procurement method is “Request for Proposals” (“RFP”). As used in this RFP, the term “Proposal,” “Bid,” or “Proposals” shall mean proposals. The terms “Proposer,” “Vendor(s)” and or “Offeror(s)” shall mean Proposer.

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# Section 1: Introduction

## 1.1 Overview

I

ndian Prairie School District 204 (“IPSD” or “District”) is issuing this Request for Proposal (“RFP”) for the purpose of selecting a qualified vendor of a fully hosted web–based Student Information System (“SIS”) to replace our current SIS. The preferred SIS will provide the District with a structured environment to collect, maintain and manage all student records and student–related information. The system will integrate student, parent, and teacher information in one platform and provide the District with the data collection and reporting capabilities to meet all federal and Illinois state reporting requirements from Preschool through Grade 13.

In addition to a core migration from the existing product, the engagement will require the development of data interfaces with multiple internal systems to achieve seamless integration that eliminates the need for all manual processes and ensures timely data synchronization.

**Proposals are due on or before June 14, 2019 at 12:00 PM CST online at** [**bit.ly/SISResponse**](http://bit.ly/SISResponse)**.** *See proposal submission instructions on page 18 in the “3.1 Submission of Proposals” section.*

### 1.1.2 About Indian Prairie School District 204

IPSD is the 4th largest school district in Illinois, serving 28,000 students across 33 schools. The 46–square–mile school district is comprised of three high schools (grades 9–12), seven middle schools (grades 6–8), 21 elementary schools (grades K–5), one preschool and one alternative school.

The District also serves general education and special education students through out–placement and other specialized programs. A complete listing of the District’s buildings and programs, with staff and student count per building, is provided in Table 1. Additional information about the District can be found on the District’s website at [www.ipsd.org](http://www.ipsd.org).

*This space intentionally left blank.*

Table 1 – District Buildings with Staff and Student Counts, as of May 15, 2019

| Level & Building | Staff Totals (FTE) | Total Students |
| --- | --- | --- |
| Certified | Admin | Support | TOTAL |
| District Office – Crouse Education Center  | 0.0 | 68.7 | 13.5 | 83.2 | – |
| Collaborative – STEM Partnership School | 2.0 | 0.0 | 0.0 | 2.0 | 47 |
| Elementary School – Brookdale | 28.6 | 3.0 | 19.2 | 54.5 | 501 |
| Elementary School – Brooks | 31.2 | 3.0 | 20.3 | 54.5 | 643 |
| Elementary School – Builta | 22.7 | 3.0 | 28.2 | 53.9 | 344 |
| Elementary School – Clow | 19.5 | 3.0 | 13.2 | 35.7 | 370 |
| Elementary School – Cowlishaw | 37.8 | 4.0 | 29.8 | 71.6 | 710 |
| Elementary School – Fry  | 31.3 | 3.0 | 23.6 | 57.9 | 625 |
| Elementary School – Georgetown | 35.7 | 5.0 | 32.7 | 73.4 | 506 |
| Elementary School – Gombert | 23.1 | 4.0 | 26.1 | 53.2 | 386 |
| Elementary School – Graham | 20.2 | 3.0 | 23.2 | 46.4 | 331 |
| Elementary School – Kendall | 20.3 | 3.0 | 18.3 | 41.6 | 365 |
| Elementary School – Longwood | 25.8 | 5.0 | 25.0 | 55.8 | 409 |
| Elementary School – McCarty | 32.3 | 4.0 | 26.7 | 63.0 | 525 |
| Elementary School – Owen | 34.5 | 3.0 | 32.6 | 70.1 | 591 |
| Elementary School – Patterson | 29.5 | 3.0 | 31.2 | 63.7 | 503 |
| Elementary School – Peterson | 34.7 | 3.0 | 15.9 | 53.6 | 685 |
| Elementary School – Spring Brook | 31.6 | 3.0 | 25.4 | 60.0 | 600 |
| Elementary School – Steck | 31.3 | 3.0 | 19.3 | 53.6 | 638 |
| Elementary School – Watts | 34.4 | 3.0 | 20.7 | 58.1 | 630 |
| Elementary School – Welch | 35.2 | 3.0 | 21.1 | 59.3 | 634 |
| Elementary School – White Eagle | 31.8 | 3.0 | 15.1 | 49.9 | 553 |
| Elementary School – Young | 37.3 | 3.0 | 26.9 | 67.2 | 654 |
| Middle School – Crone  | 55.6 | 8.0 | 24.5 | 88.1 | 876 |
| Middle School – Fischer  | 59.4 | 8.0 | 31.0 | 98.4 | 881 |
| Middle School – Granger | 63.6 | 7.0 | 30.8 | 101.4 | 1044 |
| Middle School – Gregory | 51.9 | 8.0 | 24.1 | 84.0 | 852 |
| Middle School – Hill  | 56.2 | 8.0 | 31.0 | 95.2 | 889 |
| Middle School – Scullen | 61.6 | 8.0 | 30.6 | 100.2 | 1038 |
| Middle School – Still | 52.7 | 7.0 | 31.0 | 90.7 | 796 |
| High School – Indian Plains | 8.6 | 2.0 | 7.3 | 264.6 | 77 |
| High School – Metea Valley | 162.9 | 30.2 | 71.5 | 264.6 | 2903 |
| High School – Neuqua Valley | 199.2 | 37.8 | 83.0 | 320.0 | 3441 |
| High School – Waubonsie Valley | 148.1 | 37.8 | 65.9 | 243.8 | 2536 |
| High School – Frontier Campus (Historic) | – | – | – | – | – |
| Out Placed – Special Education | – | – | – | – | 143 |
| Out Placed – Regular Education | – | – | – | – |
| Preschool – Prairie Children Preschool | 29.0 | 4.0 | 91.5 | 124.5 | 882 |
| Transition – STEPS (At High Schools) | 9.0 | 3.0 | 33.7 | 45.7 | 93 |
|  TOTAL | 1,594.2 | 531.8 | 905.0 | 3,031.0 | 27,701 |

## 1.2 Terminology

Regardless of terminology, the procurement method is “Request for Proposals” (“RFP”). As used in this RFP, the term “Proposal,” “Bid,” or “Proposals” shall mean proposals. The terms “Proposer,” “Vendor(s)” and or “Offeror(s)” shall mean Proposer. The term “RFP Website” shall reference the Proposal information site at <http://tech.ipsd.org/Subpage.aspx?id=1447>.

## 1.3 Objective

This document contains the system specifications and the requested format for vendor proposals. The primary goals of this RFP are to:

* **gain an understanding of SIS product capabilities** in order to optimally **select, implement and operate a system that will meet the District’s needs** for the next 7 – 10 years;
* **assess the total cost of ownership** for a SIS, including installation costs related to initial licensing, training, implementation, development, hardware and infrastructure as well as ongoing costs (such as software maintenance, technical support, software release upgrade costs, etc.); and
* **select a vendor partner** with a product strategy and product enhancement delivery/implementation **history that will meet the District’s needs** (both for scale and future additional functionality including regulatory requirements) throughout the life of the product usage by the District.

Vendors are to propose a complete SIS system consisting of software, hardware, installation, data conversion, software customization, training, software support, standard reports and integration with Federal reporting requirements and State of Illinois (ISBE) reporting requirements.

The District will not accept proposals that do not conform to the requirements of this RFP. Failure to address all aspects of the Project or the requirements of this RFP in a complete and meaningful way might subject a Proposal to rejection.

## 1.4 Responsibilities and Specifications

Proposer is expected to examine and be familiar with all requirements and obligations of this entire RFP. Failure to do so will be at the Proposer’s risk. The evaluation criteria for the award of this RFP are set forth in Section 4: Selection and Rating Criteria, beginning on page 23.

## 1.5 Discussions and Negotiation

The District shall first attempt to negotiate a contract with the selected Proposer. District may discuss with the selected Proposer options for a scope or time modification and any price change associated with the modification. If District is unable to negotiate a satisfactory contract with the selected Proposer, District shall, formally and in writing, end negotiations with that Proposer and proceed to the next Proposer in the order of the selection ranking until a contract is reached or all proposals are rejected.

## 1.6 Public Notice

The following public notice will be made in the Naperville Sun on May 24, 2019 and posted on a statewide public notice website as required by 715 ILCS 5/2 1:

**PUBLIC NOTICE OF REQUEST FOR PROPOSAL (RFP)
Student Information System for
Indian Prairie Community Unit School District 204**

Notice is hereby given that the Board of Education, Indian Prairie Community Unit School District 204 “the District” is requesting proposals to provide Indian Prairie School District #204 with a Student Information System.

Proposal packet and information are available at http://tech.ipsd.org
**Proposals accepted online at http://bit.ly/SISResponse**

Proposals will be accepted online until June 14, 2019 at 12:00pm. Proposals must be submitted online using the forms and spreadsheets provided in the proposal packet available online.

Appropriate Certificates of Insurance, as described in the RFP, will be required of the successful bidder.

All vendors must comply with applicable Illinois law requiring payment of prevailing wages by contractors working on publicly funded projects, and with Illinois statutory requirements regarding labor, including Equal Employment Opportunity Laws.

BOARD OF EDUCATION, INDIAN PRAIRIE COMMUNITY UNIT SCHOOL DISTRICT 204

(Published in the *Naperville Sun*; May 24, 2019)

## 1.7 Project Schedule

The schedule in Table 2 is for information purposes only and can be modified. If modified, an update will be posted as an Addendum on <http://tech.ipsd.org/Subpage.aspx?id=1447> in the “Phase 1: Kickoff” section.

Table 2 – Project Schedule

| Activity | Date and Time (Central Time Zone) |
| --- | --- |
| **Intent to Participate Posted** | May 3, 2019 |
| **Intent to Participate Closes** | May 17, 2019 at 5:00pm CT |
| **Request for Proposal Issued Online** | May 24, 2019 by 5:00pm CT |
| **Pre–Proposal Conference** | May 28, 2019 at 11:30am CT |
| Virtual attendance is available by Zoom Meeting. Attendance is preferred but not mandatory. All questions from the conference will be posted as an addendum on [tech.ipsd.org/Subpage.aspx?id=1447](http://tech.ipsd.org/Subpage.aspx?id=1447) in the “Phase 1: Kickoff” section. Join the meeting from your computer at [ipsd.zoom.us/j/518360634](https://ipsd.zoom.us/j/518360634) or by dialing in by phone at (929) 436–2866 (New York, NY) | (669) 900–6833 (San Jose, CA) and using Meeting ID: 518 360 634. |
| **Questions Deadline** | June 5, 2019 at 12:00pm CT |
| **Questions and District Responses Posted** | June 7, 2019 at 5:00pm CT |
| **Proposal Due online at http://bit.ly/SISResponse** | June 14, 2019 at 12:00pm CT |
| Round 1 |
| **Initial Demonstrations** | June 17 – 21, 2019 |
| Proposer must schedule a demonstration, available online at [http://bit.ly/sisrfp–round1](http://bit.ly/sisrfp-round1).* If a proposal is not received, a proposer’s scheduled demonstration time will be cancelled.
* A completed proposal is required to retain a confirmed demonstration date and time.
 |
| **Proposal Evaluations** | June 14 – 24, 2019 |
| **Evaluation Outcome and Finalist Notifications** | June 24, 2019 by 5:00pm |
| Round 2 |
| **Finalist Demonstrations** | July 15 – 19, 2019 |
| Proposer must submit availability for a demonstration at [http://bit.ly/sisrfp–round2](http://bit.ly/sisrfp-round2). * If a proposer is not selected as a finalist, the scheduled demonstration will be cancelled.
 |
| **Legal Review with Finalists** | July 15 – 26, 2019 |
| **Recommendation to the Board of Education** | August 12, 2019 |
| **Fully Executed Contract** | August 13, 2019 |
| **Work/Service Begins** | August 15, 2019 |

## 1.8 Best and Final Offers

The District will evaluate and rank each proposal submitted in relation to the published selection criteria and the weighted value for those criteria. The District will select the Proposer whose proposal offers the “best value” as determined by District.

## 1.9 Late Proposals

The District will not accept Proposals received after the Proposal Due Date and Time. It shall be the sole responsibility of the Proposer to ensure that his or her Proposal is received at the appropriate location by the specified deadline as designated by the date/time stamp of the electronic submission. There shall be no exceptions to these requirements.

## 1.10 Reservation of Rights

In its sole discretion, the District reserves the right to reject any and all proposals, to waive any deficiencies or irregularities determined to be immaterial by the District, to accept the proposal it considers the best value for the District, and to waive any requirements of the RFP.

The District reserves the right, in its sole discretion, to conduct interviews of one or more Proposer and/or conduct other additional evaluation processes that are deemed necessary by the District to assist in a complete and thorough evaluation of the proposals. These processes may include additional evaluation points as determined by the District, in its sole discretion. If Proposers are selected for a demonstration, they will be notified by email at a reasonable time in advance of the scheduled demonstration. The purpose of the demonstration is for Proposer to illustrate their qualifications and/or ability to meet the District’s RFP requirements.

The District further reserves the right to contact a Proposer after the submission of a Proposal for the purpose of clarifying a Proposal to ensure mutual understanding. This contact may include written questions, interviews, site visits, or requests for corrective pages in the Proposer’s response.

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# Section 2: General Information

## 2.1 Public Information

Proposals and any other information submitted by Proposer in response to this RFP are the property of the District. The District considers all information, documentation and any material submitted in response to this RFP to be non–confidential and/or non–proprietary and therefore subject to public disclosure under the Illinois Freedom of Information Act (5 ILCS 140).

The District’s procedures for handling FOIA requests are found in policy 2:250, “[Access to District Public Records](http://board.ipsd.org/Uploads/Policies/Section%202/2250.pdf).” Details regarding the Illinois Freedom of Information Act provisions may be found in the [Guide to the Illinois Freedom of Information Act](https://www.naperville203.org/cms/lib/IL01904881/Centricity/Domain/86/FOIAGuide.pdf), prepared by the Office of Illinois Attorney General Lisa Madigan in 2004.

## 2.2 Communication Restrictions

The District designates the following person as its representative (the “Point of Contact”) in connection with this RFP:

Adam Smeets

Chief Technology Officer • Indian Prairie School District 204

780 Shoreline Drive • Aurora, IL 60504

rfq–sis@ipsd.org

Proposer shall submit by **email** any questions which may arise during the preparation of Proposal to the Point of Contact. Until the Contract is fully executed, all Proposers’ communications with respect to this RFP and/or the Project **must** be with the Point of Contact using the email address provided and **not** with any other employee, officer, Board Member agent, representative or contractor of the District.

## 2.3 Project Documentation

The District will not provide any physical copies of this RFP or related documents. The District will post all RFP documents at <http://tech.ipsd.org/Subpage.aspx?id=1447>.

## 2.4 Questions and Clarifications

All questions and requests for clarification must be submitted via email to the Point of Contact by June 5, 2019 at 12:00pm CT.

## 2.5 No Reimbursement of Proposer’s Costs

District will not reimburse or be liable to Proposer for any costs incurred in the preparation, reproduction, or delivery of Proposal or any other materials generated or submitted in connection with this RFP. Additional costs associated with the Proposer’s participating in an interview, or costs associated with negotiations are also the sole responsibility of the Proposer.

## 2.6 Current SIS Environment

For the past seven years, the District has used PowerSchool’s eSchoolPlus as its SIS system. The District uses several SIS components, and the SIS interfaces with multiple systems and applications. A listing of the primary SIS components used by IPSD is provided in Table 3:

Table 3 – Primary SIS Components

|  |  |  |
| --- | --- | --- |
| Student Information | Communications | Assessments |
| Online Student Enrollment/ Registration | Home Access (Parent & Student Portals) | Fee Management/Payment Free & Reduced Lunch |
| Attendance | Quarterly/Semester Report Cards& Weekly Progress Reports | Health/School Nurse |
| Student Discipline/Behavior | Transcripts | Special Education |
| Student/Course Scheduling | Reporting and Extracts | Staff Information |
| Gradebook | Federal & State Reporting Capabilities | Transportation |

The current SIS runs in a hosted environment by PowerSchool on five (5) web servers, three (3) task servers, one (1) server for home access (parent and student portal), one (1) report writer server, and one (1) database server.

IPSD technical staff maintains the SIS and provides support services to the District. Several members of the technical team are SQL–qualified and use their SQL competencies to move data between eSchoolPlus and the integrated applications (see Table 4, p. 15). The technical staff also develop complex reports across SIS modules for different user groups using Cognos as a delivery vehicle and interface.

The District intends to continue to use all the components listed in in Table 3 in its new SIS, including Online Registration. IPSD currently uses Online Registration to enroll new students, re–register existing students, associate student fee charges (the fees are collected through PushCoin) and complete District registration forms. As District parents and families are accustomed to a web–based registration process, any proposed SIS must include Online Registration and access capabilities.

In addition, the District is looking for an SIS with strong portal and communication capabilities to enhance the school–to–home connection. IPSD is also looking for opportunities to expand its usage of the SIS system to decrease the amount of paperwork, minimize out–of–system reporting and analysis of student information, and enhance efforts to make the SIS the source record for all student information.

### 2.6.1 SIS Integrations

The District’s SIS currently integrates with several systems and applications (see Table 4). The District intends to continue integrations with these applications; however, IPSD is continuously exploring opportunities to consolidate systems and increase access, enhance user experience and centralize student data. Vendors are asked to provide information about their system’s capabilities in attendance tracking, fees and online payments, parent/teacher conference scheduling, special education, free and reduced lunch programs and health programs in the functional requirements section.

Table 4 – Integrations

| Type of Interface | System Integration |
| --- | --- |
| Student Testing and Assessment | aimswebPlus - <https://www.pearsonassessments.com> |
| Mastery Manager - [https://www.masterymanager.com](https://www.masterymanager.com/) |
| Transportation | Versatrans - <https://www.tylertech.com/products/versatrans> |
| Online Fee Payment/Food Service | PushCoin - [https://www.pushcoin.com](https://www.pushcoin.com/) |
| Learning Management Systems | Google Classroom – <https://classroom.google.com> Amplified IT Little SIS - [https://labs.amplifiedit.com/little-sis-for-classroom](https://labs.amplifiedit.com/little-sis-for-classroom/) Instructure Canvas – <http://www.instructure.com>  |
| Library Systems | Destiny - [https://www.follettlearning.com](https://www.follettlearning.com/technology/products/library-management-system)  |
| Transcripts and College Readiness | Parchment - [https://www.parchment.com](https://www.parchment.com/)  |
| SchooLinks - [https://hello.schoolinks.com](https://hello.schoolinks.com/) |
| Data Warehouse, using SQL | Decision Ed - [https://www.decisioned.com](https://www.decisioned.com/) |
| Forecast 5 - [https://www.forecast5analytics.com](https://www.forecast5analytics.com/) |
| Communications | ConnectEd - [https://www.blackboard.com/notification-system](https://www.blackboard.com/notification-system/blackboard-mass-notifications.html)  |
| Special Education | Embrace IEP - [https://www.embraceeducation.com](https://www.embraceeducation.com/) |
| Human Resources & Finance | Lawson Infor - [https://www.infor.com](https://www.infor.com/)  |
| Frontline Education – <http://www.frontlineeducation.com>  |
| Medical | SNAP - [https://www.promedsoftware.com](https://www.promedsoftware.com/) |
| Single Sign On | Identity Automation/SAML - [https://www.identityautomation.com](https://www.identityautomation.com/)Microsoft Azure – <https://azure.microsoft.com> Google – <http://www.google.com>  |
| Data Management, using SQL | School Data Sync - <https://sds.microsoft.com/>Electronic Document Management |

## 2.7 Existing Technology Resources and Infrastructure

### 2.7.1 Network Infrastructure

The District’s network infrastructure connects the Schools and District office supporting both academic/instructional and administrative applications and providing Internet access for staff and students. Wireless connections are available across the District in all buildings.

As of July 1, 2019, the internet bandwidth accessible for the District will consist of two aggregate links totaling 6,000 Mbps. Further, WAN site connectivity for the District will consist of 1,000 Mbps to the elementary schools, 2,000 Mbps to the middle schools and 5,000 to 10,000 Mbps at the high schools.

### 2.7.2 Authentication and Credentialing

The District utilizes Active Directory as the source of truth for user credentials and identity management. For authentication, the District utilizes SAML authentication as a preferred approach, with options for Azure AD authentication.

### 2.7.3 Workstations and Computing

The District is a PC and Mac environment for staff and Chromebooks used in a ratio of 4:1 for grades Pre-K to 1 and 1:1 for grades 2 to 12. Staff workstations have the full Microsoft Office 365 suite and select applications from the Adobe Creative Cloud collection installed and available for use. Workstations authenticate using Active Directory and are connected to the District’s Azure environment. Administrative staff connecting with high-level security will be required to utilize Palo Alto Global Protect.

## 2.8 Student Information System Stakeholders

IPSD’s SIS is used extensively by staff, students, parents and families throughout the District.

For the RFP process, a wide range of stakeholders will contribute to the evaluation of a Proposer’s solution. Table 5 provides the subgroups and participation level in the RFP evaluation and selection process.

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Table 5 - Stakeholders

|  Group  | Makeup  | Involvement  |
| --- | --- | --- |
| Core Evaluation Team  | Group of 5 – 10 individuals who are involved in every aspect of the evaluation  | * Read and score written proposals
* Review functional requirement responses
* Review cost response
* Evaluate vendor finalists’ demonstrations
* Participate in final vendor selection
 |
| Round 1 Demonstration Evaluation Committee  | Group of 10 – 15 Technology Services staff (including core evaluation team)  | * Evaluate vendor round 1 demonstration
* Participate in vendor recommendation for final round demonstrations
 |
| Round 2 Demonstration Evaluation Committee  | Group of 75 – 100 staff (including core evaluation team)  | * Evaluate vendor round 2 demonstrations
* Participate in vendor recommendation for District selection for new SIS
 |
| Executive Steering Committee | Superintendent’s Cabinet  | * Act on recommendation of Evaluation Committee
 |
| Chief Technology Officer |  | * Present recommendation from the Evaluation Committee and Executive Steering Committee to the Board of Education
 |
| Board of Education |  | * Execute contract based on recommendation from the Executive Steering Committee and Evaluation Committees
 |

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# Section 3: Specific Requirements

## 3.1 Submission of Proposals

Proposals shall be submitted electronically in Microsoft Word, Microsoft Excel, or searchable PDF format with all pages numbered. Electronic signatures will be accepted for RFP submission; upon award, vendor must provide original signed (notarized where required) documents for District records. **Electronic copies must be submitted online to** [**http://bit.ly/SISResponse**](http://bit.ly/SISResponse)**. The District will not accept any physical proposals, including faxes, or verbal submissions. Electronic versions are due by the due date and time provided in Section 1.1 Overview.**

## 3.2 Proposer References

Vendors must describe their corporate background and experience with SIS implementations, preferably with implementation of SIS products in Illinois school districts equivalent in size to IPSD.

### 3.2.1 Company Information

Each vendor is to provide information regarding financial stability by providing responses to the following questions/providing the following information:

* The date established
* Ownership (e.g., public company, partnership, or subsidiary)
* Corporate office location
* Number of technical and service staff available to support installation, training, documentation, and maintenance efforts
* Number of technical staff devoted to new product development and/or enhancements to current SIS products
* Bank references
* Dun & Bradstreet number (DUNS) and report, if available
* Last Annual Report
* Statement of Income and Retained Earnings for the last two years, as applicable
* Statement of Changes in Financial Position for the last two years, as applicable
* Balance Sheet for the last two years, as applicable
* Opinions concerning financial statements from a Certified Public Accountant for the last two years, as applicable
* Explanation of any outstanding lawsuits against the branch or department of the organization involved

These questions can be found in 6.4.1 RESPONSE FORM III–A: Company & Product Overview on page 58 of the Indian Prairie School District 204 SIS RFP Response Forms.

### 3.2.2 Corporate Information

Vendors must also describe their experience as it relates to the requirements of this RFP. That is, each vendor must describe its experience delivering products and services similar to those described in this RFP within a similar environment. The projects described must be the projects for which customer references are given.

### 3.2.3 Customer References

The Vendor must provide five current (*no more than three years old*) references. For each reference, the Vendor shall provide the following information:

* District Name
* Year of product installation
* List of products installed and operational, including SIS modules outside of the base product
* Number of students in school district
* Number of school buildings
* Estimated number of EC – 12 SIS school district users
* Web address
* Customer address
* Contact name, title and contact information for a customer involved in the selection and implementation of the SIS
* Contact name, title and contact information for a customer involved in the daily use of the SIS

Please refer to and answer the questions provided on 6.4.1 RESPONSE FORM III–A: Company & Product Overview on page 58 and 6.4.2 RESPONSE FORM III–B: References on page 62 of the Indian Prairie School District 204 SIS RFP Response Forms.

## 3.3 Pricing

Price quotations 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. Proposals shall provide pricing by individual module as well as any discounts available for multiple modules, for example: SIS, Gradebook, and Data and Assessment purchases. All royalties and other applicable fees must also be included.

All prices are to be in U.S. dollars. The District is exempt from federal, state and local taxes. Taxes shall not be included in this proposal as the District will not be responsible for payment of the taxes. Illinois Sales Tax Exemption certificates will be furnished to suppliers upon written request to the District.

The District shall not be liable for any costs beyond those proposed in this RFP and awarded. Time and materials quotes are not acceptable. Vendors choosing to propose more than one alternative must use a separate cost form for each alternative.

Vendor’s product pricing details should include the following:

* Initial product purchase price and any tiered or scalability options
* Phase–In considerations (percentage of completion, other pricing that considers the need for the district to continue operations on current products through the full cycle of implementation and end of year state and federal reporting, limiting the full usability of the new SIS during implementation.)
* Ongoing maintenance pricing
* Costs of installations, data conversions and customizations
* Training costs
* Costs associated with licensing and installation of relational databases
* Estimated hardware costs needed to operate the SIS

### 3.3.1 Source Code and Software Escrow

If the software is sold with source code, please indicate any incremental cost associated with this feature. In addition, if source code is not available, you should define whether an escrow process for the software and supporting documentation is available as an integral part of the licensing agreement, and the costs associated with this service.

### 3.3.2 Total Cost Calculations

Vendors are to provide total costs information by completing the Total Costs Form found in the Excel file Indian **Prairie SD 204\_ SIS RFP TOTAL COSTS FORMS.xlsx available on the RFP website**. Vendors are to follow the instructions to complete and submit this form which summarizes all costs relating to the purchase and implementation of the SIS.

## 3.4 Interview Representation

Each Proposer will be represented at its interview, if any, by its proposed project manager who will be working directly with Owner’s designated representative if the contract for the Project were awarded to Proposer.

## 3.5 Failure to Comply with Requirements

If Proposer fails to comply with any requirements contained in this RFP, Proposer’s proposal may be considered non-responsive and will be rejected.

## 3.6 Gratuities

The District may, by written notice to the Proposer, cancel this Contract without liability to Proposer if it is determined that gratuities, in the form of entertainment, gifts, or otherwise, were offered or given by the Proposer, or any agent, or representative of the Proposer to any officer or employee of the District with a view toward securing a contract or securing favorable treatment with respect to the awarding or amending or the making or any determinations with respect to the performing of such a contract. In the event this Contract is canceled pursuant to this provision, the District shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by Proposer in providing such gratuities.

## 3.7 Warranty Price

The price to be paid by the District shall be that contained in Proposer’s proposal which Proposer warrants to be no higher than Proposer’s current prices on orders by others for products of the kind and specification covered by this agreement for similar quantities under similar or like conditions and methods of purchase. In the event Proposer breaches this warranty, the prices of the items shall be reduced to the Proposer’s current prices on orders by others, or in the alternative, the Owner may cancel this Contract without liability to Proposer for breach or Proposer’s actual expense.

Proposer warrants that no person or selling agency has been employed or retained to solicit or secure this Contract upon an agreement or understanding for commission, percentage, brokerage, or contingent fee excepting bona fide employees of bona fide established commercial or selling agencies maintained by the Proposer for the purpose of securing business. For breach or violation of this warranty, the District shall have the right in addition to any other right or rights to cancel this Contract without liability and to deduct from the Contract price, or otherwise recover the full amount of such commission, percentage, brokerage or contingent fee.

## 3.8 Safety Warranty

Proposer warrants that any products sold to the District or used as part of their scope of work shall conform to the standards promulgated by the U.S. Department of Labor under the Occupational Safety and Health Act (OSHA) of 1970. In the event the product does not conform to OSHA standards, the District may return the product for correction or replacement at the proposer’s expense. In the event Proposer fails to make the appropriate correction within a reasonable time, correction made by the District will be at Proposer’s expense.

## 3.9 Equal Opportunity Employment

Unless otherwise exempted under Executive Orders 11246, 11375, or the applicable rules and regulations, as amended, Proposer agrees to comply with the provisions of Executive Orders 11246 of September 1966 and 11375 of October 1967, as amended, ASPR 7-103.18 (a) and 12-804 are incorporated herein by reference. Further, Proposer agrees to include the provisions of said clauses in all orders or subcontracts that fall within the classifications set forth above and are placed pursuant to this Contract.

## 3.10 Audits

Proposer agrees that the District, the Department of Education, the Comptroller General of the United States, or any of their duly authorized representatives, must have access to any books, documents, papers, and records of the Proposer which are directly pertinent to this specific program/project for the purpose of making audits, examinations, excerpts, and transcriptions.

## 3.11 Criminal Background Check

If applicable to the Project, Proposer must certify on forms provided by the District that, for each employee of Proposer who (1) will have direct contact with students (substantial opportunity for verbal or physical interaction with students that is not supervised by a certified educator or other professional District employee), and (2) will have continuing duties related to the Project, the Proposer has obtained, as required by Illinois State law.

* A Fingerprint-based criminal history records check pursuant to 5/10-21.9 of the Illinois School Code, as well as checks of the Illinois Sex Offender Registry and the Illinois Murderer and Violent Offender Against Youth Registry.
* Proposer will also be required to obtain from each and every lower tier contractor or independent contractor the form of certification, relating to the employees of such contractors and independent contractors. All Proposer and lower tier contractor forms must be submitted prior to the commencement of work by the Proposer or the applicable lower tier contractor/independent contractor, who will have direct contact with students, must not be prohibited from being employed by the School District pursuant to state law, or any higher standard established by the District, must not have been listed on the Illinois Sex Offender Registry or the Illinois Murderer and Violent Offender Against Youth Registry.

# Section 4: Selection and Rating Criteria

Upon submission of a proposal, 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 will be rejected by the District and excluded from further consideration.

Submitted proposals, including written responses, spreadsheet responses, total cost of ownership calculations, vendor demonstrations, and reference checks will all be considered in the selection of an SIS vendor.

Complete and compliant vendor responses will be reviewed and scored based on vendor replies based on the criteria stated in this RFP. The following scale will be used to evaluated RFP responses:

Table – Proposal Evaluation Criteria

|  |  |
| --- | --- |
| Criteria | Percentage |
| Request for Proposal – Spreadsheet Responses*Modules, Functional Requirements, Technical Requirements, Integrations, Integration Requirements* | 25% |
| Round 1 Demonstration | 20% |
| Total Cost of Ownership | 20% |
| Round 2 Demonstration (Invitation Only) | 15% |
| Request for Proposal – Narrative Responses | 15% |
| Reference Checks and Feedback | 5% |

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## 4.1 Request for Proposal - Spreadsheet Responses

### 4.1.1 Modules

Individual vendor responses to spreadsheet criteria will be weighted based on vendor responses and product availability. The options and definitions are included in Table 7.

Table - District Requirement Levels and Factors (Modules)

|  |  |
| --- | --- |
| District Level of Requirement | Multiplier Factor |
| District Required*The requirement is required by the District as part of the solution proposed.* | 4 |
| District Preferred*The requirement is a priority for the District but is not required as part of the solution proposed.* | 3 |
| District Nice to Have*The requirement was identified as a key opportunity for the District to transition an external service provider or tool to the SIS.* | 2 |
| District Optional*The requirement was identified as an optional feature that would be of benefit to the District but is not required as part of the solution proposed. Optional requirements are often practices that are currently handled outside of the system using manual or semi-automated methods.* | 1 |

The weightings are provided in Table 8. These weightings will be applied automatically to responses with the multiplier factors in Table 7 to generate Module Scores.

Table - Vendor Response Value Weightings (Modules)

| Vendor Response to “Included in Product” | Weight |
| --- | --- |
| In Current Version, No Cost*The module is included in the proposed solution at no additional cost to the District.* | 1.0 |
| Limited Functionality in Current Version, No Cost*The module is included in the proposed solution at no additional cost to the District; however, functionality is limited based on the District’s requirement.* | 0.6 |
| Future Release, No Cost*The module will be included in a future release (under 3 months) at no cost to the District. Please indicate target date for completion in the comments.* | 0.4 |
| In Current Version, Additional Cost*The module is available in the proposed solution at an additional cost to the District. Must include the estimated associated costs (must also be included in RFP Costs Excel Form) in the comments field.* | 0.4 |
| Limited Functionality in Current Version, Additional Cost*The module is included in the proposed solution at an additional cost to the District; however, functionality is limited based on the District’s requirement. Must include the estimated associated costs (must also be included in RFP Costs Excel Form) and target date for completion in the comments field.* | 0.2 |
| Future Release, Additional Cost*The module will be included in a future release (under 3 months) at an additional cost to the District. Must include the estimated associated costs (must also be included in RFP Costs Excel Form) and target date for completion in the comments field.* | 0.1 |
| Not Included*Requirement will not be met.* | 0 |

### 4.1.2 Technical and Functional Requirements

Individual vendor responses to spreadsheet criteria will be weighted based on vendor responses and product availability. The options and definitions are included in Table 9.

Table 9 - District Requirement Levels and Factors (Technical and Functional)

|  |  |
| --- | --- |
| District Level of Requirement | Multiplier Factor |
| District Required*The requirement is required by the District as part of the solution proposed.* | 4 |
| District Preferred*The requirement is a priority for the District but is not required as part of the solution proposed.* | 3 |
| District Nice to Have*The requirement was identified as a key opportunity for the District to transition an external service provider or tool to the SIS.* | 2 |
| District Optional*The requirement was identified as an optional feature that would be of benefit to the District but is not required as part of the solution proposed. Optional requirements are often practices that are currently handled outside of the system using manual or semi-automated methods.* | 1 |

The weightings are provided in Table 10. These weightings will be applied automatically to responses with the multiplier factors in Table 9 to generate Functional and Technical Requirement Scores.

Table 10 – Vendor Response Value Weightings (Technical and Functional)

| Vendor Response to “Included in Current Version” | Weight |
| --- | --- |
| Yes – Fully Meets Requirement*The proposed solution fully meets the requirement. This application requirement is met by proposed software that is installed and operational at other sites and can be demonstrated to the District.* | 1.0 |
| Supplied by Third Party – No Cost to District*Requirement will be met by third-party software package and is included at no additional cost in this proposal. Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed.* | 1.0 |
| Customization – No Cost*Requirement will be met by customizing existing software or using software tools such as application report writer or query, at no cost to the District. Must include the following in the comments field:** *Description of customization*
* *Estimated level of complexity (High, Medium, Low)*
* *Target date for completion*
 | 0.8 |
| Under Development – Within 3 Months*Requirement will be met by packaged software that is currently under development, in beta test or not yet released. Please indicate target date for completion.* | 0.6 |
| Partially Meets Requirement*At least one component, but not all components, meet the overall requirement. This application requirement is met by proposed software that is installed and operational at other sites and can be demonstrated to the District.* | 0.5 |
| Under Development – Within 6 Months*Requirement will be met by packaged software that is currently under development, in beta test or not yet released. Please indicate target date for completion.* | 0.4 |
| Customization – Cost to District*Requirement will be met by customizing existing software for an additional cost to the district. Must include the following in the comments field:** *Description of customization*
* *Estimated level of complexity (High, Medium, Low)*
* *Target date for completion*
* *Estimated associated costs (must also be included in RFP Costs Excel Form)*
 | 0.2 |
| Under Development – Greater than 6 Months*Requirement will be met by packaged software that is currently under development, in beta test or not yet released. Please indicate target date for completion.* | 0.2 |
| Supplied by Third Party – Cost to District*Requirement will be met by third-party software package and is included at an additional cost in this proposal. Note: In the Comments column, indicate the name of the proposed third-party software package and indicate the interface/integration services being proposed, as well as estimated associated costs.*  | 0.2 |
| No*Requirement will not be met.* | 0 |

### 4.1.3 Integrations

Individual vendor responses to spreadsheet criteria will be weighted based on vendor responses and product availability. The options and definitions are included in Table 11.

*This space intentionally left blank.*

Table - District Requirement Levels and Factors (Integrations)

|  |  |
| --- | --- |
| District Level of Requirement | Multiplier Factor |
| District Required*The requirement is required by the District as part of the solution proposed.* | 4 |
| District Preferred*The requirement is a priority for the District but is not required as part of the solution proposed.* | 3 |
| District Nice to Have*The requirement was identified as a key opportunity for the District to transition an external service provider or tool to the SIS.* | 2 |
| District Optional*The requirement was identified as an optional feature that would be of benefit to the District but is not required as part of the solution proposed. Optional requirements are often practices that are currently handled outside of the system using manual or semi-automated methods.* | 1 |

The weightings are provided in Table 12. These weightings will be applied automatically to responses with the multiplier factors in Table 11 to generate an Integrations score.

Table - Vendor Response Value Weightings (Integrations)

| Vendor Response to “Vendor Experienced with Integration to System” | Weight |
| --- | --- |
| Yes*The vendor regularly provides data integration support for the identified product.* | 1.0 |
| No*The vendor has limited or no experience in providing data integration support the identified product.* | 0 |

### 4.14 Integration Requirements

Individual vendor responses to spreadsheet criteria will receive points for vendor responses and product availability. The options and definitions are included in Table 13 and Table 14.

Table - Vendor Response Values (Integration Requirements – Existing Product)

| Vendor Response to “Already Included in Existing Product?” | Points |
| --- | --- |
| In Current Version, No Cost*The module is included in the proposed solution at no additional cost to the District.* | 4.0 |
| Limited Functionality in Current Version, No Cost*The module is included in the proposed solution at no additional cost to the District; however, functionality is limited based on the District’s requirement.* | 2.4 |
| Future Release, No Cost*The module will be included in a future release (under 3 months) at no cost to the District. Please indicate target date for completion in the comments.* | 1.6 |
| In Current Version, Additional Cost*The module is available in the proposed solution at an additional cost to the District. Must include the estimated associated costs (must also be included in RFP Costs Excel Form) in the comments field.* | 1.6 |
| Limited Functionality in Current Version, Additional Cost*The module is included in the proposed solution at an additional cost to the District; however, functionality is limited based on the District’s requirement. Must include the estimated associated costs (must also be included in RFP Costs Excel Form) and target date for completion in the comments field.* | 0.8 |
| Future Release, Additional Cost*The module will be included in a future release (under 3 months) at an additional cost to the District. Must include the estimated associated costs (must also be included in RFP Costs Excel Form) and target date for completion in the comments field.* | 0.4 |
| Not Included*Requirement will not be met.* | 0 |

Table - Vendor Response Values (Integration Requirements – Integration With Third Party)

| Vendor Response to “Can Integrate with Third Party Provider?” | Points |
| --- | --- |
| Yes*The vendor regularly provides data integration support for the identified feature.* | 1.0 |
| No*The vendor has limited or no experience in providing data integration support the identified feature.* | 0 |

## 4.2 Vendor Demonstrations

### 4.2.1 Round 1: Initial Demonstrations

Vendors are asked to provide software and technical demonstrations of their SIS product to the District’s IT team. These demonstrations and hands–on experience will enable the technical team to evaluate the proposed SIS products and determine which products are best able to meet the demands of the District. The scenarios for the Demonstration Cases are provided within Section 8.2 Round One – Demonstration Cases of this RFP.

Vendors are also asked to provide five (5) administrative accounts to provide the technical team with access to a production sand box of the proposed system. This should allow the team to have hands–on experience with the system, including creating non-administrative accounts, i.e. teacher, student or parent access. The login(s) should remain active for no shorter than fourteen (14) days, but no longer than thirty (30) days.

Each case includes a series of demonstrations to complete a case scenario. All Round 1: Initial Demonstration steps will be evaluated individually, and by each participant, based on the following rubric:

Table - Evaluation of Vendor Round 1 Demonstration Rubric

|  |  |
| --- | --- |
| Criteria |  Low High |
| **Ease of Use** | 1 | 2 | 3 | 4 | 5 |
| **Level of Functionality** | 1 | 2 | 3 | 4 | 5 |
| **Compatibility with District Needs** | 1 | 2 | 3 | 4 | 5 |

The first-round presentation results and accumulated scores from Technical, Functional, Total Costs, and written responses to Company Information and Experience, Project Management, Training, and Federal & State Reporting questions will be compiled by June 24, 2019, to determine the Finalists to be invited to Round 2: Finalists Demonstrations. The two (2) vendors with the highest scores will be invited to the final demonstrations.

### 4.2.2 Round 2: Finalist Demonstrations

The selected Finalists will be asked to provide an in–depth presentation of their SIS product to a cross–functional SIS evaluation team with representation from IT, curriculum, teachers, deans, counsellors, secretaries, principals and other stakeholder groups. Each vendor is to present the Use Case scenarios provided in this RFP (see 8.4 Round Two – Demonstration Cases) and is to provide a hands–on experience for different user groups (e.g. IT, teachers, administrators, deans, counsellors, secretaries, etc.). Any additional questions to be covered in presentations shall be provided to the Finalists no less than seven (7) days prior to the demonstration. All finalists will be asked to supply the same information and will be given the same time guidelines. Presentations will be scored by all participants as described in the Round 2: Finalist Demonstrations Scoring Guidelines.

Vendors are also asked to re-enable the existing five (5) administrative accounts to provide the technical team with access to a production sandbox of the proposed system. This should allow the team to have hands–on experience with the system, including creating non-administrative accounts, i.e. teacher, student or parent access. The login(s) should remain active for no shorter than fourteen (14) days, but no longer than thirty (30) days.

Similar to Round 1, each case includes a series of demonstrations to complete a case scenario. All Round 2: Final Demonstration steps will be evaluated individually, and by each participant, based on the following rubric:

Table - Evaluation of Vendor Round 2 Demonstration Rubric

|  |  |
| --- | --- |
| Criteria |  Low High |
| **Ease of Use** | 1 | 2 | 3 | 4 | 5 |
| **Level of Functionality** | 1 | 2 | 3 | 4 | 5 |
| **Compatibility with District Needs** | 1 | 2 | 3 | 4 | 5 |

## 4.3 Total Cost of Ownership

Pricing scores will be evaluated by the District based on a sliding scale with the lowest responsible cost proposal receiving full points. All other proposals will receive a percentage of the overall available points based on the difference of their pricing from the lowest provided.

## 4.4 Request for Proposal – Written Responses

Written responses to additional Technical questions and questions regarding Company Information and Experience, Project Management, Training, and Federal & State Reporting will be evaluated based on the following criteria:

Table - Evaluation of Vendor Written Responses

|  |  |
| --- | --- |
| Criteria |  Low High |
| **Was the question answered completely and with a high level of quality and overall assurance?** | 2 | 4 | 6 | 8 | 10 |
| **Did the proposer provide additional detail to further clarify the answer?** | 1 | 2 | 3 | 4 | 5 |
| **Did the proposer demonstrate a thorough understanding of the question and District need based on their response?** | 2 | 4 | 6 | 8 | 10 |

## 4.5 Reference Checks and Feedback

A short questionnaire will be sent to the contact person identified in provided references. References will also receive a request for follow-up teleconference. Questions and follow-up discussions will be based on the following topic areas:

* Background (Scope of work, modules purchased, length of SIS use)
* Quality of Planning (District and vendor planning process)
* Execution of Overall Plan (Vendor execution, issue resolution and effectiveness)
* Training Plan (Types of training, extent of training and agency recommendations)
* Customer Support (Vendor responsiveness, type of support, hours of operation and quality)
* System Performance (Performance issues, software deficiencies, concerns, uptime and reliability)
* Overall Satisfaction (District, school and audience level)

To provide both quantitative and qualitative data from the reference checks, each of the implementation areas above will be assigned a score based on the following rubric:

Table - Vendor Reference Check Rubric

|  |  |
| --- | --- |
| Criteria | Points |
| Excellent | 5 |
| Very Good | 4 |
| Average | 3 |
| Fair | 2 |
| Poor | 1 |

*This space intentionally left blank.*

## 4.6 Final Evaluation

All components will be normalized to 1,000 points and each Proposer’s score will be computed as indicated in each section above. Proposals will be scored based on the following scoring matrix:

Table – Round 1 Evaluation Scoring Matrix

The major component scores are highlighted in yellow.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Vendor | 5-Year Cost of Ownership | % of Cost Points | Cost Points Normalized Score | 20% of Cost Points | Spreadsheet Responses Raw Score | Normalized Spreadsheet Responses Normalized Raw Score | 25% of Requirements Points |
|  |  |  |  |  |  |  |  |

⏷ *Evaluation criteria continues below* ⏷

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Vendor | Written RFP Raw Score | Written RFP Normalized Raw Score | 15% of Written Points | Round 1 Demonstration Raw Score | Round 1 Demonstration Normalized Raw Score | 20% of Round 1 Demonstration Points | Total Round 1 Points Awarded | Vendor Finalists Rank Order |
|  |  |  |  |  |  |  |  |  |

The top two vendors based on the cost, spreadsheet responses, and written proposal components, will be selected to move on to round two. The scores for vendor demonstrations and reference checks will be added to previous scores to arrive at a total point summary and vendor ranking.

Round two will be scored based on the following scoring matrix:

Table – Round 2 Evaluation Scoring Matrix

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Vendor | Round 2 Demonstration Raw Score | Round 2 Demonstration Normalized Raw Score | 15% of Round 2 Demonstration Points | Reference Check Raw Score | Reference Check Normalized Raw Score | 5% of Reference Points | Total Round 2 Points Awarded | Vendor Finalists Rank Order |
|  |  |  |  |  |  |  |  |  |

The vendor with the highest overall score based on the evaluation criteria will be awarded the contract.

Table – Total Points Matrix

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Vendor | Total Round 1 Points Awarded | Total Round 2 Points Awarded | Overall Total Points Awarded | Vendor Finalists Rank Order |
|  |  |  |  |  |

The selected vendor will be notified by July 26th, 2019. Contract negotiations will begin between IPSD and both vendors at the beginning of Round 2.

*This space intentionally left blank.*

# Section 5: Scope of Work Overview

## 5.1 Business and Technology Considerations

As the District looks to replace its SIS, there are numerous business and technology considerations that will be incorporated into product selection as well as the system implementation:

* **Product:** The preferred SIS should be fully integrated and built using mainstream technologies on an open architecture that is scalable. The system must be user–friendly with a browser–based user interface with workflow features that simplify and streamline student administrative processes. Access must be open and secure for all authorized district and school users. The product must have extensive functionality allowing for ease of navigation, editing controls, drop–downs, and ease of search and selection capabilities, as well as the development of audit logs for all entered information.
* **Centralized Systems:** The system must be a centralized system for all students from pre–school to post–graduation (e.g. special education students).
* **Data and Process Ownership:** Data should be owned as close to the originating source as possible and captured at the source. When possible, data should be “owned” by a single user. This includes responsibility for entering, updating and validating information.
* **Reporting and Extracts:** Accessing information from the system should be functional, intuitive, and flexible, allowing those who have responsibilities for using SIS information to generate reports locally. Users should have access to data fields and report formatting based on their specific needs. Similarly, the users should have access to and appropriate permissions for performing extracts. Users may have a need to access data across one or more table, module or database. The ease, flexibility and accessibility of data extraction and reporting is imperative.
* **Integrated Business Process & Systems:** A single entry point is needed for any data element in the SIS. For any data items that will be shared with the SIS originating from another system, an automated feed will be required; for any data items originating from the SIS, automated extracts are required. The goal is to enter data “once and only once,” keeping data in sync across systems. The SIS product will need to address and manage a two directional flow of information between systems that remain outside of the SIS, including an automated process for reviewing and editing the data prior to accepting.
* **Internet / Web Accessibility**: The SIS application must be a web–based application.
* **Mobile Devices**: The system should be easily accessible and viewable via mobile and hand–held devices.
* **Product Strategy**: The preferred vendor will demonstrate ways in which the product has been, and continues to be, enhanced.

## 5.2 Strategic Technology Design

The new system is to be configured around a powerful enterprise relational database (Microsoft SQL Server preferred) with the capacity to support IPSD’s needs for the foreseeable future (seven to ten years). A key focus of the new system is flexibility to meet the current and future needs of the District with minimal custom programming.

The proposed SIS should:

* Provide an integrated technology infrastructure which supports decision–making and staff productivity.
* Seamlessly interface with all integrated systems and applications identified in Table 4.
* Provide training initially and over time to administrators and staff to ensure timely implementation and effective use of the new SIS.
* Provide well–designed standards for user and technical support and a uniform system for establishing, disseminating, and monitoring policies and procedures regarding the SIS.

Selection of the new SIS will consider not only purchase price, hardware costs, and implementation costs, but also full life–cycle costs associated with maintenance, support, and training as well as being the best system for the District.

## 5.3 Information Architecture

IPSD’S technology architecture strives to tie administrative and instructional applications together in an integrated multi–vendor environment. This integrated environment extends from the classroom, site level, the District and to the home portals. This centralized computing requires standardized interfaces and connectivity, allowing complete integration of information from multiple sources on multiple hardware and operating system platforms. It also facilitates high productivity, easy–to–use tools for users and systems managers.

Any proposed SIS must present an information architectural design which minimizes ongoing support costs through:

* **Ease of use** — By incorporating an easy–to–use user interface the system will support user self-service, provide just-in time support and to complete tasks independently.
* **Reliability/availability** — The system must minimize hardware and software failure so people will have the confidence to rely on it.
* **Maintainability** — When problems occur or software upgrades are needed, support must be available in an easily accessible and timely manner.
* **Supportability** — To coordinate support when assistance is necessary, district support staff must have access to information regarding all previously reported problems and their solutions.

In addition, ability to use an industry standard reporting tool such as the Microsoft BI Suite, Cognos, etc. would be desirable.

## 5.4 System Scalability and Performance

The proposed SIS must be scalable and able to process concurrent user transactions within acceptable industry response times for similar type of transactions. Response time is defined as the interval from the time a user sends a transaction to the time a visual confirmation of transaction completion is received. The response times below are to be met under normal workload conditions, including peak periods where most schools are performing similar functions within the same short time period (such as attendance accounting, student data inquiries, and grade reporting).

The response time requirement is as follows:

* At least 90% of total number of unique transactions that the SIS is capable of performing must exhibit 2–second or less response time with a T1 connection. The SIS itself (using the proposed vendor recommended database platform, web server, and hardware) should be able to generate a basic web page under two (2) seconds, under heavy load. A database query could take up to two (2) seconds with a fully loaded database having history and meeting data retention requirements. The vendor will be expected to guarantee performance of their solution.
* The remaining 10% of unique transactions (or less) must exhibit 10–second or less response time.
* Specific exceptions will be made for complex functions such as generating a complex search or tumbling the full school scheduling. For any specific functions that require longer response times than the range above, the vendor must itemize these functions and state the anticipated response times (with accompanying reasons) in the Vendor’s proposal.
* Any other conditions or exceptions to the metrics stated in the above three paragraphs must be identified by the vendor in the Proposal. These response time requirements are intended to insure application usability from a user’s perspective.

## 5.5 Data Query, Extracts and Reporting Facilities

The SIS data reporting and query capabilities should allow for a wide variety of report types including summary, detail, forms, drill down as well as allowing for fast and easy report creation using report wizards that easily integrate with Microsoft Office products and PDF writer. Reporting must be able to link data that can be logically related across modules. For example, select all students who took Class A in 8th grade, and report their grade for Class B in the current year, sorting by class rank. The District standard is Microsoft Office 365 Pro Plus for all users.

## 5.6 Technical Requirements

The SIS serves as the foundation of IPSD’s District–wide data repository to support District–wide analysis of student data. The preferred SIS is a web–based, centrally managed system capable of high–speed access supporting all district–wide locations (schools and offices) providing real time access to the SIS applications. Response time is critical for all processes and should not be impacted by record volumes as a semester or school year progresses.

IPSD has developed a list of technical requirements for its SIS replacement. These requirements have been divided into 8 major categories:

* Functionality
* Performance
* Data Load/Data Migration
* Security
* Integration
* Hosting
* Backup/Testing
* Support

A full listing of the Technical Requirements is included in the Excel file **Indian Prairie SD 204\_SIS RFP REQUIREMENTS.xlsx available on the RFP website**. Please follow the instructions to complete and submit these Technical Requirements. In addition, vendors are to provide descriptions the following technical items surrounding their SIS product. They are to describe:

* Product support programs to the District’s technical staff and SIS users;
* Product upgrades and enhancement programs;
* Recommended operating system environment to run the SIS;
* Plans to evaluate current and future District capacity requirements for the SIS;
* SIS’s authorization system and describe in detail how the application will integrate with external authentication;
* Ongoing operational and administrative support that District personnel must provide once the initial set–up and data loading is complete; and
* Standard and ad hoc reporting capabilities within the system.

These questions can be found in RESPONSE FORM IV: Technical Responses of the Indian Prairie School District 204 SIS RFP Response Forms.

IPSD also requests vendors to evaluate the overall operational requirement of the proposed SIS solution and to recommend appropriate hardware to satisfy the District’s needs when the SIS is fully implemented. Vendors are to provide hardware recommendations and costs for this equipment in the Total Costs Forms found in Excel file **Indian Prairie SD 204\_SIS RFP TOTAL COSTS FORMS.xlsx available on the RFP website**.

## 5.7 Functional Requirements

As mentioned, the current SIS is used extensively across the District. IPSD has developed a list of functional requirements for its SIS replacement based on discussions with different SIS stakeholder groups. These requirements have been divided into the following major categories:

* + Assessments
	+ Attendance
	+ Bilingual/ESL
	+ Communication
	+ Discipline/Behavior
	+ Early Childhood
	+ Eligibility/Weekly Progress Reports
	+ Fees/FRL
	+ Grade Reporting
	+ Gradebook & Teacher Experience
	+ Health
	+ Home Access
	+ Human Resources
	+ Registration (Online & Manual)
	+ Reporting
	+ Master Scheduling
		- Elementary
		- Middle School
		- High School
		- Other
	+ State Reporting
	+ Transcripts
	+ Transportation
	+ User Experience

Additional functional requirements are included for Fees and Online Payments, Special Education, Free and Reduced Lunch programs and Health programs for which data is currently imported from other applications. A full listing of the Functional Requirements by category is provided in the Excel file **Indian Prairie SD 204\_ SIS RFP REQUIREMENTS.xlsx available on the RFP website**. Vendors are to follow the instructions provided to complete and submit these Functional Requirements.

## 5.8 Project Management, Staffing & Implementation Plan

Vendors are to describe, in detail, their proposed approach to the project to achieve a successful implementation of the SIS system. The system is to be installed and tested from October 2019 through July 2020 and is to be implemented for the school year beginning August 2020. Vendors are to provide:

* A proposed project approach including the SIS development and implementation plans;
* The recommended best practices to migration data from legacy system to the vendor’s SIS;
* The vendor’s proposed project management staff including detail of the staff’s experience;
* The proposed Testing & Acceptance Plans the vendor uses to verify and validate data and the system implementation; and
* A description of the support the vendor will provide during Go Live

Please refer to and answer the questions provided on Form V–A: Project Management & Staffing RESPONSE FORM V–A: Project Management & Staffing of the Indian Prairie School District 204 SIS RFP Response Forms.

## 5.9 Training and Staff Development

As training is critical to the successful implementation of an SIS, IPSD requires the vendor to be responsible for the technical and end–user training for all staff involved with the SIS. This staff includes:

* District staff responsible for the technical management and operation of the SIS system;
* District staff that accesses and reports on student information;
* School principals/assistant principals;
* School guidance counselors;
* School and District special education staff;
* School and District bilingual/ESL staff
* Other District–level directors and administrators;
* Teachers at all levels (Elementary, Middle/Jr. High and High School); and
* Other school level personnel including nurses, librarians, secretaries, health aides, assistants, and other administrative clerical staff.

The vendor is expected to provide user training that is tailored to meet school and District staff needs based on job function. The vendor should also provide formalized classroom curricula and on–the–job training for the District’s SIS technology and support staff to ensure the District technology staff is fully capable of maintaining all technical aspects of the system. The overall training supplied by the vendor must be sufficient to provide quality system usage by all District personnel involved with the SIS across the following modules:

* + Assessments
	+ Attendance
	+ Bilingual/ESL
	+ Communication
	+ Discipline/Behavior
	+ Early Childhood
	+ Eligibility/Weekly Progress Reports
	+ Fees/FRL
	+ Grade Reporting
	+ Gradebook & Teacher Experience
	+ Health
	+ Home Access
	+ Human Resources
	+ Registration (Online & Manual)
	+ Reporting
	+ Scheduling
	+ State Reporting
	+ Transcripts
	+ Transportation

In a training response, vendors are to provide a complete description of:

* The plan to train all stakeholders including descriptions of courses, number of training sessions required, and timing of training;
* The qualifications and experience of proposed trainers;
* The alternative training methods available such as web–based training sessions;
* The types of training material available; and
* Continuous training opportunities available after Go Live.

Please refer to and answer the questions provided on Form V–B: Training & Staff Development of the Indian Prairie School District 204 SIS RFP Response Forms.

## 5.10 Federal and State Reporting

Vendors are to provide an overview of their organization’s strategies to identify changes to federal and state reporting requirements; to modify all impacted fields and reports and to communicate these changes to school districts. Please refer to and answer the questions provided on RESPONSE FORM V–C: Federal & State Reporting of the Indian Prairie School District 204 SIS RFP Response Forms.

*This space intentionally left blank.*

# Section 6: Proposal Forms

Below is a list of all items to be included with the submission of the RFP package. Please mark off the requirements for each form as you complete them. Complete and sign all forms included in this document as PDF materials. Submit response forms and other data-entry items in **MS Word** and **Excel** electronically to [**http://bit.ly/SISResponse**](http://bit.ly/SISResponse)**.**

**All responses must be received before 12:00 p.m. CDT on June 14, 2019.**

The Functional and Technical Requirements can be found in the Excel file **Indian Prairie SD 204\_ SIS RFP REQUIREMENTS.xlsx available on the RFP website**.The cost forms can be found in the Excel file **Indian Prairie SD 204\_SIS RFP TOTAL COSTS FORMS.xlsx available on the RFP website.** Please refer to the instructions in these files, provide all the required information and submit the forms as **Excel** files.

During submission, include in the subject line: *Company Name | IPSD SIS RFP*. All file names should also include the vendor name.

## 6.1 Proposal Submission Checklist

Vendors are to complete and submit the following forms which can be found the Indian Prairie School District 204 SIS RFP Response Forms:

* **FORM I: Proposer Forms**
* Statement of Proposer
* Certificate of Eligibility to Bid
* **FORM II: District Affidavits and Forms**
* FORM II–A: Non–Collusion Affidavit
* FORM II–B: Proof of Insurability
* FORM II–C: Individual’s Drug Free Workplace Certification
* FORM II–D: Contractor’s Drug Free Workplace Certification
* FORM II–E: Hold Harmless Agreement
* FORM II–F: Indian Prairie Community Unit School District 204 Smoking and Tobacco Policy
* FORM II–G: Certificate of Prevailing Wage Payment
* FORM II-H: Sponsored Access Request
* **FORM III: Company Information**
* FORM III–A: Company and Product Overview
* FORM III–B: References
* **FORM IV: Technical Responses**
* **FORM V: Other Responses**
* FORM V–A: Project Management & Staffing
* FORM V–B: Training & Staff Development
* FORM V–C: Federal & State Reporting
* **FORM VI: Attachments**
* FORM VI-A: Spreadsheet Responses
***Form VI-A is available on the RFP Website***
* FORM VI-B: Total Costs Forms
***Form VI-B is available on the RFP Website***
* **ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA**
* **AUTHORIZATION**

## 6.2 RESPONSE FORM I: Proposer Forms

The District requires the completion, signing and submission of the following two (2) forms. **Electronic signatures will be accepted for RFP submission**; upon award, vendor must provide original signed (notarized where required) documents for District records. These include:

* FORM I–A: Statement of Proposer
* FORM I–B: Certificate of Eligibility to Bid

### 6.2.1 FORM I–A: Statement of Proposer

I have examined the specifications and instructions included herein and agree, provided I am awarded a contract within ninety (90) days of the response due date, to provide the specified items and/or services or work as described in the specifications and the instructions for the sum shown in accordance with the terms stated herein. All deviations from specifications and terms are in writing and attached. This authorization also certifies vendor compliance with all applicable State and Federal laws.

Name of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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City, State, Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Principal Officer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Partnership or Corporation
Under State Laws Of: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Authorized Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Person to Contact
Regarding This Bid: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 6.2.2 FORM I–B: Certificate of Eligibility to Bid

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (contractor), pursuant to Section 33E–11 of the Illinois criminal code of 1961 as amended, hereby certifies that neither (he, she, its) partners, officers, or owners of (his, her, its) business have been convicted in the past five (5) years of the offenses of bid–rigging under Section 33E–3 of the Illinois Criminal Code of 1961 as amended and that neither (he, she, its) business has ever been convicted of the offense of bid–rotating under Section 33E–4 of the Illinois Criminal code of 1961 as amended.

Signature of Contractor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## 6.3 RESPONSE FORM II: District Affidavits and Forms

The District requires the completion, signing and submission of the eight (8) forms included on the following pages. **Electronic signatures will be accepted for RFP submission**. Upon award, vendor must provide original signed (notarized where required) documents for District records. These include:

* FORM II–A: Non–Collusion Affidavit
* FORM II–B: Proof of Insurability
* FORM II–C: Individual’s Drug Free Workplace Certification
* FORM II–D: Contractor’s Drug Free Workplace Certification
* FORM II–E: Hold Harmless Agreement
* FORM II–F: Indian Prairie Community Unit School District 204 Smoking and Tobacco Policy
* FORM II–G: Certificate of Prevailing Wage Payment
* FORM II-H: Sponsored Access Request

### 6.3.1 FORM II–A: Non–Collusion Affidavit

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, being first duly sworn, deposes and says:

 (print name)

that he/she is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (owner, president, partner, etc.) (name of company)

the party making the foregoing Proposal, that this Proposal is genuine and not collusive or sham; that Contractor has not colluded, conspired, connived or agreed, directly or indirectly, with any person, to put in a sham Proposal or to refrain from bidding, and has not in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference with any person; to fix the price element of said Proposal or that of any other proposer, or to secure any advantages against any other proposer or any person interested in the proposed contract.

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The above statements must be subscribed and sworn before a notary public.

Subscribed and sworn before me on the \_\_\_\_\_\_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 2019.

Notary Public \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notary Seal (stamp)

### 6.3.2 FORM II–B: Proof of Insurability

Proposal Submitted By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contractor Name

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

Address, including City, State and Zip Code

Being duly sworn, I do hereby acknowledge that I have read the insurance specifications herein and agree the above contractor is eligible for insurance per aforesaid specifications.

Subscribed and sworn before me on the \_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 2019.

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Insurance Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

Address, including City, State and Zip Code

Notary Public: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notary Seal (stamp)

Note: Certificate(s) of insurance are to be submitted with bid.

The RFP responder hereby certifies that the responder/bidder is not barred from bidding on this contract as a result of a violation of either the bid–rigging or bid–rotating provisions of Article 33E of the Criminal Code of 1961, as amended.

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 6.3.3 FORM II–C: Individual’s Drug Free Workplace Certification

Pursuant to 30 ILCS 580/1 et seq. (the “Drug Free Workplace Act”), the undersigned certifies to the Board of Education of Indian Prairie Community Unit School District #204, that he/she will not engage in the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance in the performance of this contract. Failure to abide by this Individuals’ Drug Free Workplace Certification will subject the individual to the penalties set forth in Sections 6, 7, and 8 of the Drug Free Workplace Act.

NOTICE: This Individual’s Drug Free Workplace Certification is to be completed by an individual directly responsible for the performance of a contract of $5,000 or more with the District.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 6.3.4 FORM II–D: Contractor’s Drug Free Workplace Certification

Pursuant to 30 ILCS 580/1 et seq. (“Drug Free Workplace Act”), the undersigned certifies to the Board of Education of Indian Prairie District #204 it will provide a drug–free workplace by:

* Publishing a statement:
	+ notifying employees that unlawful manufacture, distribution, possession, or use of a controlled substance, including cannabis, is prohibited in the Contractor’s workplace;
	+ specifying actions that will be taken against employees for violations of this prohibition;
	+ notifying employees that, as a condition of employment on this contract, employees will:
		- abide by the terms of the statement,
		- notify the Contractor of any criminal drug statute conviction for a violation occurring in the workplace, no later than five (5) days after such conviction.
* Establishing a drug–free awareness program to inform employees about:
	+ the dangers of drug abuse in the workplace;
	+ the Contractor’s policy of maintaining a drug–free workplace
	+ available drug counseling, rehabilitation, and employee assistance programs
	+ penalties that may be imposed upon employees for drug violations.
* Making it a requirement to give a copy of the statement in subsection “1” to each employee engaged in performance of the contract and posting it in a prominent workplace location.
* Notifying the District within ten days after receiving notice in subsection “1”, paragraph “C”, part “2”, from an employee, or otherwise receiving notice of such conviction.
* Imposing a sanction or requiring participation by a convicted employee, in a drug abuse rehabilitation program, as required by Section 5 of the Drug Free Workplace Act.
* If required, assisting employees in selecting drug counseling, treatment, and/or rehabilitation, and indicating a trained referral team is in place.
* Making a good–faith effort to maintain a drug–free workplace through implementation of Section 3 of the Drug Free Workplace Act.
* Failure to abide by this Contractor’s Drug Free Workplace Certification will subject the contractor to penalties set forth in Sections 6, 7, and 8 of the Drug Free Workplace Act.

For: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (company name) (signature)
Its: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_

 (owner, president, partner, etc.)

NOTICE: This Contractor’s Drug Free Workplace Certification is to be completed by any corporations, partnerships or other entities with twenty–five or more employees at the time of contract, or a department, division, or unit thereof, directly responsible for the performance of a contract of $5,000 or more with the Owner.

The undersigned responder/bidder or agent, having 25 or more employees, does hereby certify pursuant to section 3 of the Illinois Drug–Free Workplace Act (III. Rev. Stat., ch. 127, par. 132.313) that (he, she, it) shall provide a drug–free workplace for all employees engaged in the performance of work under the contract by complying with the requirements of the Illinois Drug–Free Workplace Act and, further certifies that, (he, she, it) is not ineligible for award of this contract by reason of debarment for a violation of the Illinois Drug–Free Workplace Act.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 6.3.5 FORM II–E: Hold Harmless Agreement

The contractor agrees to indemnify, keep and save harmless Indian Prairie Community Unit School District #204, its Board of Education, agents, officials and employees against all injuries, judgements, costs and expenses that may accrue against Indian Prairie Community Unit School District #204 in consequence of granting this contract or that may result therefrom, whether or not it shall be alleged or determined the act was caused through negligence or omission of the contractor or his employees, of the District or its employees arising therefrom or incurred against the District in any such action, and shall at his own expense discharge same.

The contractor agrees to indemnify, keep and save harmless Indian Prairie Community Unit School District #204, its Board of Education, agents, officials and employees against all injuries, judgements, costs and expenses that may in any way accrue against Indian Prairie Community Unit School District #204 in consequence of use by the contractor’s employees of equipment owned, rented or leased by the District.

The contractor understands and agrees that any insurance protection required by this contract, or otherwise provided by contractor, will in no way limit the responsibility to indemnify, keep and save harmless and defend Indian Prairie Community Unit School District #204 as herein provided.

Name of Contractor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### 6.3.6 FORM II–F: Indian Prairie Community Unit School District 204 Smoking and Tobacco Policy

The use of tobacco by any school personnel, student, or other person is prohibited on Indian Prairie Community Unit School District #204 property. This prohibition applies to such property before, during, and after the regular school day, and on days when school is not in session.

The term “tobacco” will mean cigarettes, cigars, pipes, or tobacco in any form, including smokeless tobacco which is any loose, cut, shredded, ground, powdered, compressed or leaf tobacco intended to be placed in the mouth without being smoked.

“School property” includes, without limitation, any area within a building or other indoor facility used for school purposes, and areas outside buildings and facilities, whether owned, leased or contracted by the district.

“School purposes” include all events, activities or other uses of school property that the board or the officials of the district authorize or permit, including

Without limitation, all interscholastic or extra–curricular athletic, academic or other events sponsored by the board or in which pupils of the district participate.

This action is taken in compliance with the Illinois school code, section 10–20.5b; goals 2000: educate America act, part c, (the “pro–children act of 1994”).

Agreed and Signed by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ of (contractor official) (company)

it’s \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

 (position) (date)

### 6.3.7 FORM II–G: Certificate of Prevailing Wage Payment

The Contractor hereby certifies that all laborers, workers and mechanics performing work under the Contract shall not be paid less than the prevailing wage as found by the Illinois Department of Labor or the Board of Education, and that Contractor and all subcontractors shall in all other respects comply with the Prevailing Wage Act in carrying out work under the Contract. If, during the course of work under this Contract, the Department of Labor revises the prevailing rate of hourly wages to be paid under this Contract, Contractor shall have the sole responsibility and duty to ensure that the revised prevailing rate of hourly wages is paid by Contractor and all subcontractors to each worker to whom a revised rate is applicable. Revisions to the prevailing wage as set forth above shall not result in an increase in the Contract sum. Contractor shall protect, defend, indemnify and hold the School District harmless for any claims or demands made as a result of Contractor’s failure to comply with this certification.

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (Contractor’s Authorized Representative)

SUBSCRIBED and SWORN TO before me this \_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_.

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

NOTARY PUBLIC

Notary Seal: (stamp)

### 6.3.8 FORM II–H: Sponsored Access Request

This form is for requesting a District account, access to network resources, or application level access for associates, consultants, contractors, or guests of Indian Prairie School District 204 (District) - herein referred to as “sponsored access.” Access requests require a District sponsor and may only be requested for persons conducting official District business.

Once the form is submitted with all the required fields completed, please allow up to five (5) business days for processing and verification. In some cases, training may be required before access is granted. Access terminates after midnight on the end date specified. The maximum length of time allowed for the account or access is twelve (12) months. The sponsor must submit a new request form prior to the end date to avoid disruption of service. It is the responsibility of the Sponsor to immediately submit this form for termination of access if the account/access is no longer required prior to the specified end date.

**Section 1: Individual Needing an Account and/or Escalated Access to a District Resource**

This agreement is made between Indian Prairie Community Unit School District No. 204, 780 Shoreline Drive, Aurora, Illinois, 60504, referred to as the “School District,” and:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

City, State and Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Country *(if outside the U.S.A.)*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Personal Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of Birth: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Daytime Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

herein referred to as “Guest.”

**Section 2: Access Requested**

* Access to the wired and wireless network, subject to internet filtering
*Access to external VPN, anonymous proxy, proxy servers, remote desktop connections or other network modification utilities are not available on the IPSD network.*
* Login access to a District workstation, printers and designated network drives
* VPN Access to the District network

**Section 3: Account Expiration**
Access for this account will be designated if a contract is awarded to the Proposer for the length of the support engagement. The Sponsored Access Request can be severed by either party in writing.**Section 4: District Sponsor for Requested Account (To Be Completed by the District)**

Sponsor Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

herein referred to as “Sponsor.”

Employee ID Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Building/Room Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number / Extension: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

District Email Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By signing this form, I certify that I am the sponsor/host responsible for the actions of the Guest identified in “Section 1”, and understand that I am required to:

1. Ensure that the individual identified in “Section 1” reads and agrees to abide by the District Board of Education and Technology Services policies and procedures;
2. Notify Technology Services when the above-named has concluded their business in the District; and
3. Notify Technology Services that the above-named is still active when the periodic deactivation of Sponsored Access Accounts takes place. *Failure to do so will result in the account or escalated access being deactivated.*
4. Request and loan items from Technology Services on my guest’s behalf if additional technology needs are required.

Sponsor (District) Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Non-Disclosure Agreement.** Guest in the course of their relationship with District may have access to or acquire confidential personally identifiable information in fulfillment of a license, contracted services or other relationship. Guest acknowledges by this Agreement that this information is confidential and that the District has the duty to maintain the confidentiality of this information.

Guest has the duty to keep confidential all personally identifiable information that is deemed to be confidential and to abide by the regulations and statutes of the State of Illinois and the United States of America regarding privacy and security of confidential information maintained by the School District, including, but not limited to: the Family Educational Rights and Privacy Act (FERPA), the Illinois School Student Records Act (ISSRA), the Payment Card Industry Data Security Standards (PCI DSS), the Gramm-Leach-Bliley Act, the Health Insurance Portability and Accountability Act (HIPAA), and identity theft. Guest agrees to cooperate, and shall cause its officers, employees, agents, and subcontractors to cooperate with the School District, as necessary, to comply fully with these legal obligations.

Moreover, IPSD imposes its own policies and standards regarding the safeguarding of the District assets. Please review the Board of Education policies (<http://board.ipsd.org/Policies.aspx>) and Technology Services policies and guidelines (<http://tech.ipsd.org/Default.aspx?id=1006>).

In consideration of the mutual promises of performance, the School District and Guest agree as follows:

**District Data, Confidentiality and Personally Identifiable Information.** Guest will not disclose District Data to third parties without prior written consent of District, unless required by law. Guest will maintain a record of its disclosures of District Data and provide a copy of such record to District at its request. Unless Guest is required by law, Guest will promptly notify District of any subpoena or court order for District Data and allow District a reasonable amount of time to take any necessary or appropriate action prior to Guest responding to subpoena or court order. Guest will promptly report to District any use or disclosure of District Data not permitted under the request.

The Guest shall cause each officer, director, employee, and other representative who shall have access to any “District Data,” which is defined as all student Personally Identifiable Information (“PII”) and other non-public information, including student data, metadata, and user content, of the District students (hereinafter “District Data”) during the term of the access request to maintain in strict confidence and trust all District Data, including the following:

Guest declares their capability of safeguarding all District Data accessed, viewed or maintained. Guest agrees to implement all safeguards that may be necessary to maintain the security and confidentiality of all information accessed, viewed or maintained, and to prevent the disclosure of District Data except as required by law.

With respect to any “Covered Information” as defined by the Illinois Student Online Personal Protection Act, the Company agrees to comply with the terms of that Act and refrain from using the Covered Information in any way prohibited by the Act.

The identity of Guests having access to District Data will be documented and access will be logged. The Guest has read, understood, and received appropriate instruction as to how to comply with these laws and the data protection provisions of this request, and shall be responsible for any failure of such individuals to comply with such obligations.

*FERPA and ISSRA.* With respect to any District Data that could be considered “education records” as defined under the Family Educational Rights and Privacy Act (“FERPA”) and/or “school student records” as defined under the Illinois School Student Records Act (“ISSRA”), the Guest acknowledges that for the purposes of this request it will be designated as a “school official” with “legitimate educational interests” in the education records, as those terms have been defined under FERPA and ISSRA and their implementing regulations. The Guest agrees to abide by the FERPA and ISSRA limitations and requirements imposed on school officials. The Guest will collect and use District Data only for fulfilling its duties under the relationship for the Guest and the District’s end users’ benefits and will not share District Data with or disclose it to any third party except as provided for in this Addendum, required by law, or authorized in writing by the District.
 *COPPA.* With respect to the Guest’s collection, use or disclosure of personal information from students, as governed by the Children’s Online Privacy Protection Act (“COPPA”), the Guest agrees that the Guest’s use of the personal information and any other District Data will be solely for the benefit of the District’s students and for the school system, and that the Guest will not collect personal information from students for any purpose other than the District’s purpose, including any other commercial purpose.

*PPRA.* With respect to the Guest’s collection, disclosure, or use of personal information as governed by the Protection of Pupil Rights Amendment (“PPRA”), the Guest agrees that such collection, disclosure, or use, and any use of any District Data, shall be for the exclusive purpose of developing, evaluating, or providing educational products or services for, or to, the District’s students or educational institutions.

*Wireless Credit Card Processing.*Sponsors and guest(s) cannot process credit card payments over the District’s wireless internet or cellular connection via laptops, cell phones, tablets or other similar devices. Wireless credit card processing must be approved by Technology Services.

*Third-Party Credit Card Processing.*Sponsors and guest(s) cannot allow third party vendors to process payments on campus using IPSD’s analog lines, Ethernet connections, or wireless internet. Sponsors or any District user cannot share their user credentials with third parties who come on-campus, and third parties cannot use the District’s wireless access to process credit card payments.

**Ownership.** All District Data will remain District’s property and District shall retain full control over all such Data shared with or collected by the Guest.

**Software and Licensing.** District has purchased the right to use software on computers that is protected by copyright laws. At no time may this software be copied for use on a workstation or server other than the one for which it was originally intended. Only software purchased and/or authorized by District may be used on its workstations or servers. Software purchased personally or downloaded from the Internet, may not be used without approval from Technology Services, due to licensing issues, the potential exposure to computer viruses and the potential impact on the computer network. District has the right to monitor for compliance at any time and without prior notification.

**Indemnification.** Guest shall indemnify, protect, defend, and hold harmless the District and its trustees, officers, agents, employees and representatives against any and all claims, demands, suits, and causes of action and any and all liabilities, costs, damages, expenses, and judgments, incurred in connection therewith relating to or arising out of unauthorized use or disclosure of confidential information and/or “District Data”.

**Copyright.** Copyright, trademark and patent infringement is strictly prohibited. The federal Copyright Act extends to much of what is transmitted over computer networks, such as text, pictures, music and software. Since copyright infringement is a strict liability crime, intent to infringe is not required.

**Security.** Guest will immediately report to the District any unauthorized use, access, or disclosure of confidential information and/or District Data. Breaches of information security, intellectual property, Internet usage, electronic mail and the sharing of access codes, identifications, or passwords, or wrongful access to the District network or systems connected to that network, are viewed as serious violations. Guests violating this policy will be subject to action, which may include but is not limited to termination of access to the system and termination of outstanding agreements. Violators are also subject to civil or criminal liability.

**Data Storage**. The Guest shall not transmit to or store any District Data on a server or other data storage medium located outside the United States of America.

**Representation on Authority of Parties and Signatories.** Guest and District signatories of request represent and warrant that he or she is duly authorized and has legal capacity to execute.

**Electronic Signature and Acceptance.** A signature is defined in the same manner as in the State of Illinois Electronic Commerce Security Act (5 ILCS 175/5-105) as any symbol executed or adopted, or any security procedure employed or adopted, using electronic means or otherwise, by or on behalf of a person with intent to authenticate a record. An electronic signature is defined as a signature in electronic form attached to or logically associated with an electronic record.

**Agreement.** Guest has read, understands, and agrees with the terms and conditions as stated in this document. Further, Guest has read and understands the policies, and all procedures, including the Guest’s personal responsibilities, and agree to abide by their provisions.

**Account Credentials.** Account information and initial credentials will be e-mailed to the Guest’s personal email address, unless the intended individual already has a District e-mail address.

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| INDIAN PRAIRIE COMMUNITY UNIT SCHOOL DISTRICT NO. 204Signed on the \_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Print Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Title | PROPOSERSigned on the \_\_\_\_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Print Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Title |

## 6.4 RESPONSE FORM III: Company Information

Please complete the following two (2) questionnaires (Company Information and Company Experience) regarding your company, product and experience. If the information requested does not apply to your product or organization, enter “N/A”. Items may be included as an attachment to your responses. For those items, please note “*Attached*” below.

### 6.4.1 RESPONSE FORM III–A: Company & Product Overview

| Company Information |
| --- |

|  |
| --- |
| What date was your company established? |
| What is the type of corporation/ownership (e.g., public company, partnership, or subsidiary)? |
| Where is your corporate office location? |
| How many technical and service staff are available to support installation, training, documentation, and maintenance efforts? |
| How many technical staff are devoted to new product development and/or enhancements to current SIS products/modules? |

|  |
| --- |
| Please identify any changes in your organization over the past 18 months including mergers, reorganizations, acquisitions, and buy–outs. Please identify any known or planned organizational changes including mergers, reorganizations, acquisitions and buy–outs. |
| Please provide bank references. |
| Please provide a Dun & Bradstreet number (DUNS) and report, if available |
| Please provide Statement of Income and Retained Earnings for the last two years, as applicable |
| Please provide Statement of Changes in Financial Position for the last two years, as applicable |
| Please provide Balance Sheet for the last two years, as applicable |

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| Please provide opinions concerning financial statements from a Certified Public Accountant for the last two years, as applicable. |
| If applicable, please attach your last Annual Report. |
| Include any explanations of outstanding lawsuits against the branch or department of the organization involved. |

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| --- |
| Company Experience |
| Describe your company’s experience as it relates to the requirements of this RFP. That is, describe your company’s experience providing and managing the delivery of SISs. Include installations of these products within EC–12 districts that are Illinois–based and/or equivalent in size to IPSD. The information provided should correspond with your list of company references. |
|  |

### 6.4.2 RESPONSE FORM III–B: References

Use this form to provide reference contacts from five (5) customers who are using your product and who have implemented the product within the last three years. EC–12 references that are similar in size to IPSD and districts based in Illinois are strongly preferred.

* The District asks that you provide two (2) names and associated contact information per customer, as follows:
* Selection/Implementation Contact: A contact who can answer questions about selection and implementation.
* User Contact: A contact who can answer questions about daily use of the SIS.

It is acceptable to provide one contact name if that person can clearly address both selection/ implementation and daily use of the system. Only include references willing to be contacted. Contact may begin within 24 hours of receipt of your reference list. It is the vendor’s responsibility to ensure up–to–date contact details.

| Reference 1 |
| --- |
| District / School Name |  |
| Year(s) products implemented |  |
| Name(s) of product(s) installed & operational |  |
| Number of students |  |
| Number of schools/buildings |  |
| Number of SIS school district users(admin, teachers, deans, etc.) |  |
| Web address |  |
| Full street address |  |

|  |
| --- |
| **Contact 1: Selection/Implementation Contact** |
| Contact 1 Name & Title |  |
| Contact 1 Phone # |  |
| Contact 1 Email address |  |
| **Contact 2: User Contact** |
| Contact 2 Name & Title |  |
| Contact 2 Phone # |  |
| Contact 2 Email address |  |

|  |
| --- |
| Reference 2 |
| District / School Name |  |
| Year(s) products implemented |  |
| Name(s) of product(s) installed & operational |  |
| Number of students |  |
| Number of schools/buildings |  |
| Number of SIS school district users(admin, teachers, deans, etc.) |  |
| Web address |  |
| Full street address |  |

|  |
| --- |
| **Contact 1: Selection/Implementation Contact** |
| Contact 1 Name & Title |  |
| Contact 1 Phone # |  |
| Contact 1 Email address |  |
| **Contact 2: User Contact** |
| Contact 2 Name & Title |  |
| Contact 2 Phone # |  |
| Contact 2 Email address |  |

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| --- |
| Reference 3 |
| District / School Name |  |
| Year(s) products implemented |  |
| Name(s) of product(s) installed & operational |  |
| Number of students |  |
| Number of schools/buildings |  |
| Number of SIS school district users(admin, teachers, deans, etc.) |  |
| Web address |  |
| Full street address |  |

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| --- |
| **Contact 1: Selection/Implementation Contact** |
| Contact 1 Name & Title |  |
| Contact 1 Phone # |  |
| Contact 1 Email address |  |
| **Contact 2: User Contact** |
| Contact 2 Name & Title |  |
| Contact 2 Phone # |  |
| Contact 2 Email address |  |

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| --- |
| Reference 4 |
| District / School Name |  |
| Year(s) products implemented |  |
| Name(s) of product(s) installed & operational |  |
| Number of students |  |
| Number of schools/buildings |  |
| Number of SIS school district users(admin, teachers, deans, etc.) |  |
| Web address |  |
| Full street address |  |

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| --- |
| **Contact 1: Selection/Implementation Contact** |
| Contact 1 Name & Title |  |
| Contact 1 Phone # |  |
| Contact 1 Email address |  |
| **Contact 2: User Contact** |
| Contact 2 Name & Title |  |
| Contact 2 Phone # |  |
| Contact 2 Email address |  |

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| Reference 5 |
| District / School Name |  |
| Year(s) products implemented |  |
| Name(s) of product(s) installed & operational |  |
| Number of students |  |
| Number of schools/buildings |  |
| Number of SIS school district users(admin, teachers, deans, etc.) |  |
| Web address |  |
| Full street address |  |

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| --- |
| **Contact 1: Selection/Implementation Contact** |
| Contact 1 Name & Title |  |
| Contact 1 Phone # |  |
| Contact 1 Email address |  |
| Contact 2: User Contact |
| Contact 2 Name & Title |  |
| Contact 2 Phone # |  |
| Contact 2 Email address |  |

## 6.5 RESPONSE FORM IV: Technical Responses

Please answer the questions provided below. If your response exceeds the provided space, please provide an attachment and indicate that an attachment is provided in your response.

|  |
| --- |
| Support & Maintenance |
| Describe and outline your product support program and options to the District’s technical staff and to district staff, counsellors, teachers, administrators and other end users including hotline or toll–free numbers, day and time availability, and any restrictions. Include a recommendation for appropriate support level for this district. Document what is included in the annual maintenance fees. |
|  |
| Describe your product upgrade and enhancement program (frequency, description of major/minor releases, and typical cycle) including whether the District can choose when an upgrade is implemented or is required to take an upgrade on a pre-determined schedule. |
|  |

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| Proposed Computing Environment |
| Present, in detail, the recommended operating system environment to run the SIS. This section must contain vendor–supported hardware platforms as well as recommended hardware, operating system (OS), database management systems (DBMS), and related information. In addition, include required or recommended configuration(s) necessary to support development, testing, and training environments. If the vendor requires additional equipment and/or software to establish separate environments for development, testing, production, or training, this must be included in the vendor’s discussion of recommended hardware and OS configurations on the cost form in the Excel file **Indian Prairie SD 204\_SIS RFP TOTAL COSTS FORMS.xlsx available on the RFP website**. The vendor is to specify the basic equipment configuration as required by the proposed operational models. Any features that would not be immediately available upon installation must be clearly identified. |
|  |

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| Capacity Evaluation |
| Present, in detail, a Capacity Evaluation Plan to assist IPSD in projecting the capacity requirements necessary to support the SIS both now and in the future. Capacity planning for Servers (Database, Web, and Application) and communications (bandwidth) must be included.* The evaluation should be based on preliminary estimates from data provided by the District and the wide area network architecture. Information relating to the current hardware, software, network and communications will be provided during the planning phase of this project.
* The capacity evaluation must project, at a minimum the following: server requirements (e.g., processor, memory, and storage devices), network integration requirements, and communications (bandwidth) requirements.

The proposed solution must be interoperable, efficient, cost–effective, compatible, and reasonable for IPSD’s technical architecture. In addition, provide capacity planning information for the production system growth assuming projected growth of less than 5% per year over the next ten years. |
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| Security |
| Describe the SIS’s authorization system and describe in detail how the application will integrate with external authentication (e.g., LDAP, ADFS, Google, etc.), and authorization services. Describe any web single–sign–on techniques supported. |
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| System Administration |
| Describe the ongoing operational and administrative support that District personnel must provide once the initial set–up and data loading is complete. |
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| Reporting |
| Describe standard reports available to staff and to technology staff with your system. Also, describe the ability for staff to create ad–hoc or custom reporting and save or share these reports. |
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| Risk Management and Quality Assurance Plans |
| In this section, describe any foreseen problem areas or any unusual risks in this proposal. Explain any assumptions made in preparing this proposal about the project or the District’s intentions along with risk mitigation strategies associated with each defined risk. |
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| Product Strategy and Stability |
| Discuss planned functional and/or technical enhancements, new device support plans, etc. Discuss how future product improvements are planned, prioritized, and communicated to clients. Also, discuss likelihood of planned technical changes to the product. |
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| Licensing Approach |
| Provide licensing costs for additional users after the initial purchase, if applicable. Include in total costs forms found in Excel file **Indian Prairie SD 204\_SIS RFP TOTAL COSTS FORMS.xlsx available on the RFP website.** |
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| Differentiators |
| Use this section to describe what differentiates your product from the competition. |
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## 6.6 RESPONSE FORM V: Other Responses

This section provides a listing of questions to complete by the vendor to provide information regarding project management and staffing and training specifications. Responses are broken into the major categories listed below:

* Form V–A: Project Management & Staffing
* Project Approach
* Data Migration Plan
* Project Organization and Staffing
* Testing and Acceptance Plans
* Go Live & Go Live Support
* Form V–B: Training & Staff Development
* Training Plan
* Trainer Qualifications & Experience
* Alternative Training Methods
* Training Material
* Additional Training & Documentation
* Form V–C: Federal & State Reporting
* Federal and state reporting requirements
* Federal and state reporting requirements – User updates

### 6.6.1 FORM V–A: Project Management & Staffing

On the following pages, please provide responses to the questions regarding your recommended approach to successful implementation of the proposed SIS system.

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| Project Approach |
| Include a high–level project plan for implementation through Go Live including:* A phased work plan with detailed scope of work, a milestones list, and a timeline or specified dates for successful implementation.
* Detailed descriptions of who is responsible for each item in the scope of work.
* A comprehensive testing plan.

Note: A complete description of your training program is to be provided on Form V–B: Training & Staff Development.Assume contracts will be signed by the end of August 2019. All implementation activities must be completed in time for the start of the 2020–2021 school year on August 17, 2020. |
|  |
| Data Migration Plan |
| Include a detailed plan for migrating data from legacy system to your proposed system including:* A phased data migration plan with details of the types of data to be converted and the timing of the data conversions. Include plans for planned data updates during the implementation period and periods when double entry – data entry into the existing legacy and proposed system – is required.
* Plans to verify and validate data conversion between the legacy system and the new system. Include data conversion verifications requiring District sign–off.
* Provide a listing of any projected configuration and customization requirements.

Assume contracts will be signed by the end of August 2019. All implementation activities must be completed in time for the start of the 2020–2021 school year on August 17, 2020. |
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| Project Organization & Staffing |
| In this section, describe the management approach and organizational structure of your project team as well as list the personnel you plan to assign to that team. Include:* **Implementation Project Manager**. The Project Manager will be responsible for developing and managing a detailed work plan, interfacing with District employees, implementing and testing the product, and ensuring that the product is implemented on time and on budget.
* **Other Staffing**. List all other individuals including managers, key professional personnel, and technical team leaders who will be involved in the product implementation and the roles they will be assigned on the team.

Please attach résumés for the project manager and all other key team members. These résumés should list the individuals’ experience, including managing projects of a similar scale, implementing systems of a similar scale, and operating within district and education environments. |
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| Testing & Acceptance Plans |
| Describe the approach to system/application testing of the proposed solution. * Describe all tests to ensure system accuracy, completeness, performance, reliability, and stability. These types should include unit, system, integration, performance, and user acceptance tests.
* Provide a description of the tracking mechanism you will use for reporting defects. The tracking mechanism available to the District must record the issue description, priority, complexity, ownership, and tracking dates.
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| Go Live & Go Live Support |
| Describe your approach and offerings for ensuring a smooth transition to using the proposed solution. Include in this section or as an attachment the technical support programs available during implementation and post go–live. |
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### 6.6.2 FORM V–B: Training & Staff Development

Vendors will be responsible for providing all training to the District in relation to the SIS implementation system including, but not limited to the IT team, teachers, counselors, deans, secretaries, administrators, health professionals, and other employees.

On the following pages, please provide an overview of your training strategy to meet the training expectations outlined above. Include associated costs for training in the **Indian Prairie SD 204\_SIS RFP TOTAL COSTS FORMS.xlsx available on the RFP website**.

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| Training Plan |
| Provide a detailed description of your recommended training plan for deployment of SIS District–wide. Include class descriptions, training objectives, targeted users and recommendations regarding timing of training and number of sessions needed. The training plan should be comprehensive enough to cover the full training requirements of the District and should include training to IT staff, administrators, secretaries, counsellors, deans, teachers, and all other SIS users. |
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| Trainer Qualifications & Experience |
| Describe the qualifications and experience of your proposed trainer(s). Include a list of each individual’s experience providing training similar in scale and scope as to what is being recommended for the District. |
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| Alternative Training Methods Available |
| List the alternative training methods your company offers such as web–based or other multimedia–based training and train–the–trainer model.  |
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| Training Material & Documentation |
| Please describe all training materials and documentation provided by your company which can be reproduced and used as needed by the District. |
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| Additional Training & Documentation |
| Provide a description of refresher training opportunities, workshops, user and/or discussion group opportunities, as well as a description of any additional training and documentation available from your company. |
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### 6.6.3 FORM V–C: Federal & State Reporting

On the following pages, please provide an overview of your organization’s strategies to ensure that the school districts using your product in Illinois comply with federal and state reporting requirements.

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| Federal and State Reporting Requirements |
| Provide a detailed description of how your organization identifies changes to federal and state reporting requirements. Also, explain how changes are made and tested within the SIS system to update fields and reports to meet these requirements.  |
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| Federal and State Reporting requirements – User Updates |
| Describe how you work with school districts to inform them of changes within the SIS to address changing federal and state requirements.  |
|  |

## 6.7 RESPONSE FORM VI: Attachments

Please complete and submit the Functional Requirements, Technical Requirements and the Total Cost Forms included below. During submission, include in the subject line: *Company Name | IPSD SIS RFP*. All file names should also include the vendor name.

* FORM VI-A: Spreadsheet Responses
Indian Prairie SD 204\_ SIS RFP REQUIREMENTS.xlsx
**The Excel files for the RFP response are available at http://tech.ipsd.org/Subpage.aspx?id=1447#tab4126.**
* FORM VI-B: Total Costs Forms
Indian Prairie SD 204\_SIS RFP TOTAL COSTS FORMS.xlsx
**The Excel files for the RFP response are available at http://tech.ipsd.org/Subpage.aspx?id=1447#tab4126.**

## 6.8 ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The following Addenda to the Specifications have been received and have been considered in response to this Request for Proposal.

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The successful Proposer will bear the burden of any and all undisclosed costs.

## 6.9 AUTHORIZATION

Name of Authorized Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Authorized
Company Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employer Identification Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Company Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Street Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notarization (Affix Corporate Seal)

My being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

SUBSCRIBED and SWORN TO before me this \_\_\_\_\_ day of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, 20\_\_\_\_\_.

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My Commission Expires: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Notary Seal)

# Section 7: Required Contract Terms

**Covered Data**As used in this Addendum, “Student Data” means any and all data or information collected, maintained, generated, or inferred that alone or in combination personally identifies an individual student or the student’s parent or family, in accordance with the Family Educational Rights and Privacy Act, 34 C.F.R. § 99.3, and the Illinois School Student Records Act, 105 ILCS 10/2 and other non–public information, including student data, metadata, and user content.

As used in this Addendum, “Employee Data” means any and all data or information collected, maintained, generated, or inferred that alone or in combination personally identifies an individual employee or the employee’s family, and other non–public information, including employee data and metadata.

As used in this Addendum, “School District Data” means any and all “Student Data” as defined by this Addendum and any and all “Employee Data” as defined by this Addendum.

**Compliance with State and Federal Law**

*Student Data.* All data sharing, use, and storage will be performed in accordance with the requirements of the Family Educational Rights and Privacy Act of 1974 as amended, 20 U.S.C. § 1232g & 34 C.F.R. § 99 (“FERPA”) and the Illinois School Student Records Act (ISSRA), 105 ILCS 10/1 et seq.& 23 IAC 375.

The Company acknowledges for the purposes of this Addendum that it will be designated as a “school official” with “legitimate educational interests” in the Student Data, as those terms have been defined under FERPA and ISSRA and their implementing regulations.

To the extent that the Company’s collection, use or disclosure of personal information from students is governed by the Children’s Online Privacy Protection Act (“COPPA”), the Company agrees that the Company’s use of the Student Data will be solely for the benefit of the School District’s students and for the school system, and that the operator will not collect personal information from students for any purpose other than the School District’s purpose, including any other commercial purpose.

With respect to the Company’s collection, disclosure, or use of Student Data as governed by the Protection of Pupil Rights Amendment (“PPRA”), the Company agrees that such collection, disclosure, or use, and any use of any Student Data, shall be for the exclusive purpose of developing, evaluating, or providing educational products or services for, or to, the School District’s students or educational institutions.
With respect to any “Covered Information” as defined by the Illinois Student Online Personal Protection Act, the Company agrees to comply with the terms of that Act and refrain from using the Covered Information in any way prohibited by the Act.

With respect to any “Personal Information” as defined by the Illinois Children’s Privacy Protection and Parental Empowerment Act, the Company agrees to comply with the terms of that Act to the extent applicable.

*Employee Data.*All data sharing, use, and storage will be performed in accordance with the requirements of any applicable state and federal law.

**Company Obligations**

*Uses and Disclosures as Provided in the Agreement.*The Company may use and disclose the School District Data provided by the School District only for the purposes described in the Agreement and only in a manner that does not violate local, state, or federal privacy laws and regulations. Only the individuals or classes of individuals will have access to the data that need access to the School District Data to do the work described in the Agreement. The Company shall ensure than any subcontractors who may have access to School District Data are contractually bound to follow the provisions of the Agreement and this Addendum.

*Nondisclosure Except as Provided in the Agreement.* The Company shall not use or further disclose the School District Data except as stated in and explicitly allowed by the Agreement and state and federal law. The Company does not have permission to re–disclose School District Data to a third party except as provided for in this Addendum, as required by law, or as authorized in writing by the School District.

*Safeguards.* The Company agrees to take appropriate administrative, technical and physical safeguards reasonably designed to protect the security, privacy, confidentiality, and integrity of School District Data. The Company shall ensure that School District Data are secured and encrypted to the greatest extent practicable during use, storage and/or transmission. The Company agrees to store and process the School District Data in a manner that is no less protective than those methods used to secure the Company’s own data. The Company agrees that School District Data will be stored on equipment or systems located within the United States. The Company shall maintain complete and accurate records of these security measures and produce such records to the School District for purposes of audit upon reasonable prior notice during normal business hours. The School District reserves the right at its sole discretion to perform audits of the Company’s storage of School District Data at the School District’s expenses to ensure compliance with the terms of the Agreement and this Addendum.

*Reasonable Methods*. The Company agrees to use “reasonable methods” to ensure to the greatest extent practicable that the Company and all parties accessing School District Data are compliant with state and federal law.

*Privacy Policy.* The Company must publicly disclose material information about its collection, use, and disclosure of covered information, including, but not limited to, publishing a terms of service agreement, privacy policy, or similar document. Any changes the Company may implement with respect to its privacy policies or terms of use documents shall be ineffective and inapplicable with respect to the School District and/or School District Data unless the School District affirmatively consents in writing to be bound by such changes.

Access by students or parents/guardians to the Company’s programs or services governed by the Agreement or to any Student Data stored by the Company shall not be conditioned upon agreement by the parents/guardians to waive any of the student data confidentiality restrictions or a lessening of any of the confidentiality or privacy requirements contained in this Addendum.

*Status as Independent Vendor*. Vendor and the District are independent of one another, and neither has the authority to bind the other to any third person or otherwise to act in any way as the representative of the other, unless otherwise expressly agreed to in writing signed by both parties hereto. The Vendor shall be responsible for payment of all taxes imposed in connection with its performance of services and receipt of fees under this Contract.

The identity of Authorized Representatives having access to District Data will be documented and access will be logged. The Vendor will ensure that employees and subcontractors who perform work under the Agreement have read, understood, and received appropriate instruction as to how to comply with these laws and the data protection provisions of the Agreement, and shall be responsible for any failure of such individuals to comply with such obligations.

*Employee and Subcontractor Qualifications.* The Company shall ensure that its employees and subcontractors who have potential access to District Data have undergone appropriate background screening to the District’s satisfaction and in accordance with Section 10–21.9 of the Illinois School Code and possess all needed qualifications to comply with the terms of the Agreement including all terms relating to District Data and intellectual property protection.

*Data Return/Destruction.* Upon expiration of the term of the Agreement, upon the earlier termination of the Agreement for any reason, or upon the School District’s request, the Company covenants and agrees that it promptly shall deliver to the School District and shall return to the School District all School District Data. If return of the data is not feasible or if School District agrees, then the Company shall destroy the data. School District Data must be destroyed in a secure manner. The Company agrees to send a written certificate that the data was properly destroyed or returned within 30 days of the end of the Agreement or within 30 days of the School District’s request for destruction. The Company shall destroy School District Data in such a manner that it is permanently irretrievable in the normal course of business.

*Minimum Necessary.* The Company attests that the data requested by the Company from the School District in order for the School District to access the Company’s products or services represents the minimum necessary data for the services as described in the Agreement and that only necessary individuals or entities who are familiar with and bound by this addendum will have access to the School District Data in order to perform the work.

*Authorizations.* When necessary, the Company agrees to secure individual authorizations to maintain or use the School District Data in any manner beyond the scope or after the termination of the Agreement.

*Data Ownership.* The School District is the data owner. The Company does not obtain any right, title, or interest in any of the data furnished by the School District.

*Data Storage.* The Company shall not transmit to or store any District Data on a server or other data storage medium located outside the United States of America.

*Misuse or Unauthorized Release.* The Company shall notify the School District as soon as possible upon discovering the misuse or unauthorized release of School District Data held by the Company or one of its subcontractors, regardless of whether the misuse or unauthorized release is the result of a material breach of the Agreement.

*Data Breach.* In the event of a data breach, which means an unauthorized disclosure, access, alteration, or use of School District Data or circumstances that could have resulted in such unauthorized disclosure, access, alteration or use, the Company shall promptly institute the following:

* Notify the School District by telephone and email as soon as practicable, but no later than twenty–four hours after the Company becomes aware of the data breach;
* Provide the School District with the name and contact information for an employee of the Company who shall serve as the Company’s primary security contact;
* Assist and fully cooperate with the School District with any investigation, including interviews with Company employees and review of all relevant records, including but not limited to: assisting with any investigation; facilitating interviews with the Vendor’s employees and other involved in the matter; making available all relevant records, logs, files, data reporting and other materials required to comply with applicable law, regulation, or as otherwise reasonably required by the Board; and assist the School District with any notification the School District deems necessary related to the security breach.

The Company shall not, unless required by law, provide any notices except to the School District without prior written permission from the School District. The Company shall reimburse and indemnify the School District for any costs imposed on the School District or reasonably undertaken by the School District at its discretion associated with a data breach, including reimbursement of fees paid by the School District related to providing credit monitoring to affected individuals and payment of legal fees, audit costs, fines, and other fees undertaken by the School District as a result of the security breach.

*Access to Data.* Any School District data in the possession or under the control of the Company shall be made available to the School District upon request by the Customer. The Company shall be responsible to provide copies of or access to School District Data in the possession or under the control of the Company to the School District within a reasonable time frame and in all cases within time frames that will allow timely compliance by the School District with any statutorily or court ordered deadline. This includes requests under the Illinois Freedom of Information Act (“FOIA”), requests for student records under FERPA or ISSRA, requests for records in discovery in state or federal court or administrative proceedings, or any other request.

*Service Levels.* The Company’s products or services are provided 24 hours per day, 7 days per week. The Company shall ensure 99.5% up–time, Monday through Friday between 6 a.m. and 6 p.m. US Central Time (“Up–time”). Where Up–time percentage averages less than 99.5% in a calendar month, the School District shall have the right to terminate the Agreement immediately upon written notice to the School District and obtain a pro–rata reimbursement for its past payments to the School District and the School District shall be entitled to a refund of the School District’s fees paid for the Services, as depreciated on a straight–line basis over a 12 month period commencing on the date the School District first had access to the Services through the date of termination.

*Limited Warranty.* For the purposes of this Addendum, a “Defect” is defined as a failure of the Company’s products or services to substantially conform to the then–current Company’s User Guides materials. For as long as the Agreement is in place, the Company warrants that the Company’s products or services will not contain Defects. If the products or services do not perform as warranted, the Company will use reasonable efforts, consistent with industry standards, to cure the Defect in accordance with the Company’s then current support call process. Should the Company be unable to cure the Defect or provide a replacement product within five business days, the School District shall be entitled to a refund of its fees paid for the products or services, as depreciated on a straight–line basis over a 12–month period commencing on the date the School District first has access to the Company’s products or services through the date of termination.

**Prohibited Uses**

The Company shall not sell School District Data; use or share School District Data for purposes of targeted advertising; or use School District Data to create a personal profile of a student or an employee other than for accomplishing the purposes described in the Agreement.

Notwithstanding the previous paragraph, the Company may use School District Data to ensure legal or regulatory compliance or take precautions against legal liability; respond to or participate in the judicial process; protect the safety of users or others on the Company’s website, online service, or application; or investigate a matter related to public safety. The Company shall notify the School District as soon as possible of any use described in this paragraph.

**Miscellaneous**

*Indemnification.* The Company agrees to indemnify, protect, defend and hold harmless School District and its members individually, their officers, directors, employees, agents, attorneys and assigns, from and against all claims (including third-party), actions, suits, judgments, costs, claims, demands, losses, expenses, and liabilities of whatsoever kind or nature including reasonable legal fees incurred by the District arising out of bodily injury, including death, to any person or persons (including Vendor's officers, employees, agents, and servants) or damage to or destruction of any property, including the loss of use thereof:

* Caused in whole or in part by any act, error, or omissions by the Vendor or any subcontractor or anyone directly or indirectly employed by any of them regardless of whether or not it is caused in part by a party to be indemnified hereunder;
* Arising directly or indirectly out of the use, misuse, or failure of any machinery or equipment used directly or indirectly in the performance of this Contract.

*Insurance.* During the term of this Agreement, the Company, at its sole cost and expense, and for the benefit of the District, shall carry and maintain liability insurance evidencing that the Company has workers compensation insurance as required by law and general liability insurance with a minimum combined single limit of Two Million Dollars ($2,000,000) per occurrence and Three Million Dollars ($3,000,000) general aggregate. The insurance shall include sexual abuse and molestation coverage if the Vendor will be on District premises. All insurers shall be licensed by the State of Illinois and rated A+–VII or better by A.M. Best or comparable rating service. The comprehensive general liability shall name the School District, its Board, Board members, employees, agents, and successors as an additional insured with a waiver of subrogation in favor of the School District. Workers’ Compensation insurance must cover all costs, statutory benefits, and liabilities under State Workers’ Compensation and similar laws for the Company’s respective employees and if the Company will be on the District’s premises the Workers’ Compensation Insurance must provide an alternative employer endorsement.

The Company, at its sole cost and expense, and for the benefit of the District, shall carry and maintain professional Liability Insurance with limits in the per claim amount of not less than Five Million Dollars ($5,000,000) and the annual aggregate of not less than Five Million Dollars ($5,000,000).

The Company, at its sole cost and expense, and for the benefit of the District, shall carry and maintain cyber liability/identity theft insurance with a combined limit of Five Million Dollars ($5,000,000).

The Company, at its sole cost and expense, and for the benefit of the District, shall carry and maintain an umbrella liability insurance with a minimum combined single limit of Five Million dollars ($5,000,000) per occurrence and Five Million Dollars ($5,000,000) general aggregate.

The Company shall provide the School District with certificates of insurance and/or copies of policies reasonably acceptable to the School District evidencing the existence of the coverage described above, including form and deductibles, during the duration of the Agreement. The failure to provide acceptable insurance shall be deemed a breach of the Agreement and the School district may immediately terminate the Agreement. Such certificates of insurance shall indicate that should any of the above described policies be cancelled before the expiration date thereof, notice will be delivered to the School District in accordance with the policy provisions.

*No Assignment.* The Agreement shall not be assigned, nor shall any part of the same be subcontracted, without the written consent of the District, and in no case shall such consent relieve the Vendor from its obligations or change the terms of the contract.

*No Indemnification or Limitation of Liability by School District.* Any provision included in the Agreement that requires the School District to indemnify the Company or any other party is deleted and shall not apply to the School District. Any provision in the Agreement that limits the Company’s liability is deleted.

*Infringement.* The Company warrants that no third party has any claim to any trademark, patent, or proprietary interest in any product or services the Company provides to the School District. The Company will defend, hold harmless, and indemnify the School District from any claims brought by a third party against the School District to the extent based on an allegation that the Company product or services infringe any U.S. patent, copyright, trademark, trade secret or other proprietary right of a third party. If the School District’s use of the Company’s products is restricted as the result of a claim of infringement, the Company shall do one of the following: (i) substitute other equally suitable product or service; (ii) modify the allegedly infringing Company product or service to avoid the infringement; (iii) procure for the School District the right to continue to use the Company products or services free of the restrictions caused by the infringement; or (iv) take back such Company products or services and refund to the School District the license fee previously paid for the Company products depreciated on a straight line basis over 12 months and terminate the School District’s license to use the Company’s product.

*Taxes.* The School District is a tax–exempt organization. Federal excise tax does not apply to the School District and State of Illinois Sales Tax does not apply. The amounts to be paid to the Company hereunder are inclusive of all other taxes that may be levied, including sales, use, nonresident, value–added, excise, and similar taxes levied or imposed upon the work. The Company shall be responsible for any taxes levied or imposed upon the income or business privileges of the Company.

*Payments.* The School District shall make payments to the Company in accordance with the Illinois Local Government Prompt Payment Act, 50 ILCS 505/1. If the School District is late in making a payment it shall make interest payments at the maximum amount permitted under the Illinois Local Government Prompt Payment Act, 50 ILCS 505/4.

*Governing Law.* This Addendum shall be governed by, construed, and enforced in accordance with the laws of the State of Illinois without regard to conflict of law principles. Jurisdiction and venue for all disputes hereunder shall be the Circuit Court located in DuPage, Illinois, or the federal district court for the Northern District of Illinois.

*Renewal of Agreement.* The parties may renew the Agreement and this Addendum in writing. Any provisions in the Agreement that provide for an automatic renewal of the Agreement are deleted.

*Termination.* The School District may immediately terminate the Agreement if the School District makes the determination that the Company has breached a material term of this Addendum. The District may terminate the contract without cause after providing 60 days’ notice to the Vendor.

*Damage to Property.* In the event the District’s property or any of the surrounding areas are destroyed or damaged as a result of the Vendor’s work under the contract, the Vendor shall, at Vendor’s sole cost, restore the property or any surrounding area. Such restoration shall be to a condition at least equivalent to the condition of the affected area immediately before the destruction or damage.

*Effective Date.* The Addendum shall be deemed dated and become effective on the date the last of the parties signs as set forth below the signature of their duly authorized representatives.

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# Section 8: Appendix

## 8.1 Round One – Agenda

* 5 Minutes Welcome and Introductions
* ~1 Hour 50 Minutes Demonstration Cases
* ~5 Minutes Closing and Follow-Up Questions

## 8.2 Round One – Demonstration Cases

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| Case 1: Attendance and Lunch CountsAnticipated Demonstration Time: 5 Minutes |
| An elementary teacher is starting the day in their classroom with 27 students. Within the first thirty (30) minutes, the teacher needs to take attendance and record lunch counts for students. The students do not know what lunch options are available. Four students are absent in the class, two students are tardy, and one student is in the nurse’s office.  |
| Demonstrations to the provided scenario should include the following:* Updating attendance for a classroom using the SIS seating chart;
* Displaying the available lunch options for students;
* Recording lunch counts for individual students;
* Updating attendance for a late arrival student after attendance has been submitted; and
* Displaying the class attendance list which reflects a student that is in the nurse’s office.
 |
| Answer each of the following questions prior to the site visit:* Does your system have a default setting for attendance? In our current system, student attendance is set to “Present” unless changed.
* What options are available for recording attendance? For example, can attendance be collected by period or homeroom?
* Does your system have the ability to collect attendance “on–the–fly” or in an emergency? For example, a class is on a field trip and wants to collect attendance at different times during the day.
 |

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| Case 2: Seating ChartAnticipated Demonstration Time: 10 Minutes |
| District classrooms are using flexible seating in our classrooms, in addition to traditional seating in structured rows. A middle school teacher has 25 students in their classroom. Three students in the class have IEPs/504 plans, two students are allergic to latex and one student is not eligible to participate in sports. Students are returning from winter break and the teacher has reorganized the classroom and needs to update their seating chart. |
| Demonstrations to the provided scenario should include the following:* Printing a seating chart on a single page with user–selected fields and pictures;
* Displaying user–selected fields that can appear in the online seating chart;
* Showing the ability for substitute teachers or other users with permission to view the seating chart;
* Auto–assigning students to a seating chart;
* Modifying the layout of an existing seating chart with students already assigned to the seating chart;
* Adding and removing students from a seating chart;
* Saving a draft of the seating chart proposed changes; and
* Saving a template and applying the template to another class.
 |
| Answer each of the following questions prior to the site visit:* What fields can be displayed in a seating chart?
* If indicators are available on the seating chart, can they be customized by the District?
* Can teachers adjust the size of student pictures on the seating chart – printed and/or online?
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| Case 3: Lesson Planning Anticipated Demonstration Time: 10 Minutes |
|  A high school teacher is planning their next unit on American History and the Civil War. The teacher has “connected” parents and students who are involved in the classroom on a regular basis – online and in–person. |
| Demonstrations to the provided scenario should include the following:* Creating a new learning unit, including the anticipated start and end dates for the unit;
* Reviewing available curriculum units from the system curriculum catalog;
* Adding previously created curriculum items from the catalog to a lesson in the unit;
* Copying an activity/assignment from another class gradebook;
* Adding a new assignment for a lesson in the unit created by the teacher;
* Adding a formative and summative assessment for a lesson in the unit;
* Connecting/assigning a standard to a lesson or assessment;
* Sharing a unit or lesson with another teacher or staff member;
* Designating a component of a lesson as shared or hidden from a student and/or parent;
* Modifying a component of a lesson, a complete lesson or a unit, as visible only on a designated date, after a designated date or in a range of dates; and
* Adjusting a learning unit once created, including moving lessons or the overall unit.
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| Answer each of the following questions prior to the site visit:* If a lesson or unit can be shared with a staff member, can this be leveraged for evaluations?
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| Case 4: Evaluation and CommunicationAnticipated Demonstration Time: 15 Minutes |
| A high school teacher is ready to grade final exams, which were completed in Google Classroom. The teacher is reflective and interested in the overall performance and trends from the year. Parents and students are notified 24 hours after grades from the final exam are available.  |
| Demonstrations to the provided scenario should include the following:* Grading an assignment in Google Classroom and updating the score in the gradebook;
* Connection between the gradebook and attendance, including visual indicator of status (i.e. a student was absent on the day of the assignment or its due date);
* Changing a grade in the gradebook;
* Viewing the history on a specific grade;
* Providing a retake of the final examination;
* Adding comments on the final examination score;
* Reviewing a summary and analytic report of the exam performance;
* Displaying the notification options available to a teacher from a gradebook action; and
* Displaying the options available for parents and students to receive / opt–out of notifications.
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| Answer each of the following questions prior to the site visit:* What level of integration is available from LMS platforms and/or Google Classroom directly to the gradebook?
* How are blank grades factored into a student’s final grade?
* Does your system have a mobile application for teachers? students? parents?
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| Case 5: Online Registration (Family)Anticipated Demonstration Time: 15 Minutes |
| The Smiths are a family with two children already served by the District. Online registration has opened. The Smith’s recently moved within District boundaries, need to update their address. Each parent wants to complete *as much as possible* online, given the following:* Two children live only with Parent A and attend a high school and a middle school.
* The family has a third child who will be attending kindergarten in the Fall, and lives only with Parent B.
* A grandmother is a shared emergency contact for all three children.

**Both parents are not legally permitted to view the children who do not live with them. The District needs to maintain the data and connection between the students and their parents.** |
| Demonstrations to the provided scenario should include the following:* Adding a new child/student to begin an online registration;
* Completing online registration for a Kindergarten student;
* Completing online registration for two returning students;
* Reviewing custom pages in the online registration process, highlighting PTA, boosters or other building forms;
* Uploading residency documents from their recent move (3 forms required);
* Uploading or completing required documents (Court Order, Home Language Survey, Birth Certificate, Race/Ethnicity);
* Checking the status of their online registration;
* Reviewing communications from the District in their online portal; and
* Reviewing communications from the District in their app.
 |
| Answer each of the following questions prior to the site visit:* Can the communications or notifications be customized? If so, to what extent?
* What District level reporting, analytics and insights are available regarding online registration? (i.e. progress, stalled applications, percentage of completed forms by school)
* When connecting students or emergency contacts, what address verification options are available?
* When connecting students to a parent/guardian, what relationships are established (parent–to–student, student–to–student, household–to–student, etc.)?
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| Case 6: Online Registration (School)Anticipated Demonstration Time: 15 Minutes |
| The elementary secretary received the Smith’s application for their child’s Kindergarten enrollment. The Smith family submitted two applications for their child who will be attending Kindergarten – one from Parent A and another from Parent B. The secretary needs to complete the application review, verify residency and connect Parent B’s child to their Parent, adhering to the legal requirements. |
| Demonstrations to the provided scenario should include the following:* Reviewing and approving the change of address for residency verification when materials were provided online (3 forms required);
* Reviewing, uploading and approving the change of address for residency verification when materials were provided in person (3 forms required);
* Reviewing and approving the required documents (Court Order, Home Language Survey, Birth Certificate, Race/Ethnicity) when materials were provided online;
* Reviewing, uploading and approving the (Court Order, Home Language Survey, Birth Certificate, Race/Ethnicity) when materials were provided in person;
* Communicating with Parent B regarding required changes and missing information from the online application;
* Reviewing the online registration for completeness and approval from Parent B;
* Connecting the Smith’s child to Parent B, while protecting Parent A associated children;
* Reviewing the online registration for completeness and denial from Parent A; and
* The transition of the Kindergarten student record from completing an online registration to being enrolled in a future academic year.
 |
| Answer each of the following questions prior to the site visit:* What are the archival and retention policies on documents or resources uploaded into the system?
* How are changes indicated when a registration form is completed?
* How does the system provide access/visibility to historical registrations?
* What level of intervention is available in the system for honoring legal holds?
* What level of intervention is available in the system for prevent/reduce duplicate record creation for students, contacts or emergency contacts?
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| Case 7: SchedulingAnticipated Demonstration Time: 15 Minutes |
| A high school guidance counselor is building the schedule for the next academic year and needs to provide several reports for the department chairs. The counselor needs to ensure that the schedule accounts for student course requests, students assigned to courses based on counselor choices, graduation requirements and factors like a 70%/30% balance for students with disabilities (IEP/504). The counselor wants this process to be as automated as possible, while still being highly accurate based on the parameters above.  |
| Demonstrations to the provided scenario should include the following:* Reviewing requests from students and indicating that the requests were reviewed, including making comments on the requests;
* Identifying up to 3 alternative options on a course–level;
* Manually adjusting the balance percentages for a course from 70%/30% to 80%/20%;
* Locking a designated course and section to a student, which cannot be overridden;
* Overriding a prerequisite to enroll a student in a course, including a required comment;
* Reviewing and completing a four–year plan of courses, which includes prerequisites, graduation requirements and progress of completion;
* Completing a spin on the master schedule, showing separation between success, warnings, areas where the schedule was not honored, and recommendations to reduce overall impact;
* Building custom and on–the–fly reports (i.e. enrollment counts based on the 70%/30% students); and
* Running standard out–of–the–box reports for scheduling.
 |
| Answer each of the following questions prior to the site visit:* Does the system have the ability to save a draft of the master schedule prior to the spin?
* Does the system have the ability to complete a spin for an individual student, for groups of students, or for all students?
* Does the system have the ability to make recommendations for a master schedule based on student course requests?
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| Case 8: BehaviorAnticipated Demonstration Time: 15 Minutes |
| A middle school student was fighting with another student during passing period. Two teachers separated the fight and walked the students to the principal’s office. The incident needs to be recorded to initiate the discipline as well as meet reporting requirements for the State. Later in the day, a teacher notices that both students have talked about a fight earlier in the day.  |
| Demonstrations to the provided scenario should include the following:* A teacher creating a referral for the incident which includes Student A and Student B;
* A second teacher providing additional information on the incident in the same referral;
* Ability to add witnesses (staff), who can provide additional information in the referral, when requested;
* Ability to add notification contacts who can receive status updates;
* Ability for other staff to review behavior information on a student, with associated permissions determining the level of information available
* Recording the outcome and consequences of the discipline meeting;
* Delivery communications to parents, as determined by the staff member (i.e. time delay, no notification, information provided, using templates);
* Notification to the referral sources of the stages of the referral, but not the outcome or full details, unless permitted; and
* Adding attachments to the behavior incident.
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| Answer each of the following questions prior to the site visit:* Does your system have the ability to customize behavior form(s) by level, while meeting state reporting requirements?
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| Case 9: State ReportingAnticipated Demonstration Time: 10 Minutes |
| Technology Services submits reports to the State of Illinois and federal government. It is the first week of school and the District needs to submit a KIDS report (<https://www.isbe.net/kids>) to the State. In this process, Technology Services needs to reduce as much manual effort from the overall workflow. |
| Demonstrations to the provided scenario should include the following:* The overall workflow for completing the KIDS report for the State of Illinois.
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| Answer each of the following questions prior to the site visit:* What are the Service Level Agreements (SLAs) for your system when the State of Illinois makes changes to reporting formats, requirements or introduces a new report?
* How does your company stay informed and up to date on reporting requirements in the State of Illinois?
* What are the SLAs for your system when the federal government makes changes to reporting formats, requirements or introduces a new report?
* How does your company stay informed and up to date on reporting requirements by the federal government?
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## 8.3 Round Two – Agenda

The agenda for round two will be provided as an addendum and posted as an update on [tech.ipsd.org/Subpage.aspx?id=1447](http://tech.ipsd.org/Subpage.aspx?id=1447) in the “Phase 1: Kickoff” section.

## 8.4 Round Two – Demonstration Cases

The demonstration cases for round two will be provided as an addendum and posted as an update on [tech.ipsd.org/Subpage.aspx?id=1447](http://tech.ipsd.org/Subpage.aspx?id=1447) in the “Phase 1: Kickoff” section.