

## Request for Competitive Sealed Proposals 19CSP066 Web-Based Activity Fund Software

Date	Event
December 11, 2018 December 18, 2018	Advertise/Issue Date
December 19, 2018	Pre-Proposal Conference at 03:00 – 3:30 PM at 1111 W. 6 <sup>th</sup> St. Suite A230, Austin, TX 78703
December 19, 2018	Due Date for Questions by 5:00 pm
December 20, 2018	Questions and Answers posted on our website
January 23, 2019	<b>CSP opening / due date at 2:00 pm CST</b>
March 25, 2019	AISD Board Meeting for review/approval

**Deliver Sealed Proposals to:**

**Austin ISD  
Contract & Procurement Services  
1111 West 6<sup>th</sup> Street  
Building A, Suite 330  
Austin, TX 78703**

**Contact:**

**Lorena McBee  
Procurement Specialist  
Phone: 512-414-2127  
[lorena.mcbee@austinisd.org](mailto:lorena.mcbee@austinisd.org)**

- Questions must be submitted via e-mail to the contact person listed above.  
**In the e-mail subject line, type: *Questions 19CSP066 Web-Based Activity Fund Software***
- Q & A and Addenda will be posted on our website: [www.austinisd.org/cp/bids](http://www.austinisd.org/cp/bids)
- Proposals are due no later than 2:00 pm on the date indicated. Your proposals must be delivered by mail or hand delivery in a sealed envelope or carton. Proposals received after the specified time shall not be considered.
- **Please submit the following:**
  - Required**
    - One (1) hard copy marked “original” – include signed “required” forms
  - Requested**
    - One (1) digital copy on a flash drive – include signed “required” forms
    - Five (5) hard copy marked “copy”
- FAX, e-mail or other electronic proposals **will not be accepted.**
- Proposals must be plainly marked with:
  - Name and address of the Respondent
  - Number and Title of CSP

## **Checklist and Submission Guidelines**

This checklist is provided to help you conform to all form/document requirements stipulated in this solicitation and attached herein.  
(It is not necessary to return this checklist with your proposal.)

### **Understanding the Proposal**

Completed

- Read entire RFP document, appendices and attachments
- Review AISD Policy and Instructions on our website: [Policy and Instructions](#)
- Attend Pre-Proposal Conference (not required)
- Submit questions properly before deadline
- Review addenda, Q&A and other additional attachments

### **Forms**

Completed | Required

- |  Bid Certification
- |  Notification of Criminal History of Contractor
- |  Debarment, Suspension and Ineligibility Certification
- |  HUB Utilization Report (HUR) – HUBATT 1
- |  HUB Compliance Checklist – HUBATT 1A
- |  Conflict of Interest Questionnaire (CIQ) – electronic
- |  Strategic Partner Profile
- |  EDGAR Vendor Certification
- |  Software Vendor Certification Form

### **Submitting the Proposal**

Completed

- Review Proposal Format section of RFP (Section VI)
- Submit required hard copy marked “original”
- Submit requested quantity of digital copy on flash drive
- Submit requested quantity of hard copies marked “copy”
- Package proposal in sealed envelope or carton properly labelled
- Deliver proposal to delivery address by RFP opening / due date and time

## I. INTRODUCTION

The Austin Independent School District (herein after referred to as “AISD” or the “District”) is seeking proposals from firms qualified and experienced in providing a Web-Based school generated funds management system. Our intention is to choose a software that provide best price/performance ratio and partner that will meet AISD’s requirements and demonstrates the ability to grow with us for many years to come. The method of procurement is a Competitive Sealed Proposal.

Submit inquiries via email to the contact person listed on the cover page by the deadline specified in the schedule below. In the subject line of the email, type **Questions** and the solicitation number: **Questions 19CSP066 Web-Based Activity Fund**.

Questions received by this deadline and corresponding answers will be included in an Addendum and posted to our website at:

<http://www.austinisd.org/cp/bids>

## II. HUB PROGRAM REQUIREMENTS

The Austin ISD HUB Program promotes and strongly encourages the involvement and participation of Historically Underutilized Businesses (HUB) in District-wide procurement. When AISD considers entering into a contract estimated at \$50,000 or more, the HUB Program will determine whether subcontracting opportunities are applicable before publishing the solicitation.

All proposers are required to follow the HUB Compliance Guidelines included in this solicitation and complete either the HUB Utilization Report – HUR (HUBATT 1) or HUB Compliance Plan - HCP (HUBATT 1C) for compliance review. All HUB inquiries should be directed to the HUB Program Department.

### No Goals

No Goals are appropriate for this project. While no goals have been established for this project, the Bidder/Proposer is required to comply with AISD HUB Program Regulations if areas of sub-consulting are identified. Please complete the HUB Utilization Report – HUR form (HUBATT 1). When the HUR Form and Good Faith Effort – GFE documentation, if required, are NOT submitted at time of deadline specified in the solicitation, it will not be accepted later for compliance review. The bid may be deemed NON-RESPONSIVE.

## III. SCOPE OF SERVICE AND PERFORMANCE REQUIREMENTS

The District educates over 80,000 students and has 127 schools (15 high, 18 middle, 83 elementary, and 11 other campuses or departments). There is one account executive, assigned to the secretary or bookkeeper for each school who is the primary user of the activity fund software. There is a requirement that the software license procured vis this RFP allow for a backup user at each site.

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The District currently uses KEV Group School Cash Suite for activity fund accounting. The proposed offeror must migrate beginning account balances into the new system.

It is the intent of AISD to implement the software in June 2019. The awarded offeror should possess adequate expertise and knowledge to provide such software, including training, and documentation and ongoing support and updates in the future. Ongoing support and ability to enhance the product based on customer needs is very desirable.

The offeror will need to work closely with the Executive Director of Financial Services and the District's technology staff to install the software and coordinate training and conversion for users.

The following describes the service and performance requirements that the selected contractor will be required to perform. Failure to address or to fully describe capabilities to accomplish all elements of this section will result in a loss of evaluation points.

**a. Technical Requirements**

1. Hardware and Software Requirements (preferred)
    - a. Please detail what accommodations exist in the system or can be added to the system to provide accessibility to people with disabilities. Please include in your response the specifics of the accommodation and the specific disability that it addresses. Guidance can be found in the Rehabilitation Act of 1973 which was amended in 1998.
    - b. The system is compatible and works on Mac, Chrome, and PC operating systems. If the proposed program is not compatible with any of these systems, please clearly state this information.
    - c. The system is based on HTML5.
    - d. If the system requires Flash, it must be clearly stated together with both the unique settings required for functionality and any known incompatibilities for devices.
    - e. All or some of the modules may be purchased.
    - f. The system is fully integrated, using a single, common database and application for all features and a common user interface across all functions.
    - g. All functionality of the system can be accessed at any workstation on the district's wide area network with a standard browser (Internet Explorer, Mozilla Firefox, Apple Safari, Google Chrome).
    - h. The district can make any portion of the platform available via the Internet for home and/or community access.
    - i. The system does not require any client applications to be installed on the workstation.
    - j. The system does not require use of Terminal Services on either the workstations or servers to support the delivery of any application functionality to the browser.
    - k. The system does not require ActiveX controls or installation of Java Virtual Machine on the workstations.
    - l. The system can function within a Microsoft IIS or Apache Web Server environment.
    - m. The system can support integration with Microsoft Active Directory or LDAP for user authentication and roles.
    - n. The system can work in a proxy server environment.
    - o. The system includes support for an automated interface with existing district enterprise systems where needed. The district ERP system is Bolt. The student information system is TEAMS (Prologic).
    - p. The system requires no additional hardware or software purchases beyond the hardware/software system requirements outlined by the vendor.
    - q. The system requires no local application programming in order to become operational.
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- r. The system allows printing of information displayed in the interface from any function within the system (without requiring copy/paste operations).
  - s. The system provides for reports in a PDF format, CSV, and other Excel formats.
  - t. The system provides for HTTPS support in all functions where usernames and/or passwords or other confidential data is transmitted.
  - u. The system provides for single sign on support via SAML or similar authentication protocols, and vendor must provide a support narrative describing level of support.
  - v. The system provides for integration with AISD's identity and access management system to support secure single sign on in all functions where usernames and/or passwords are transmitted, and vendor must provide a support narrative describing level of support.
  - w. If the product is a learning application, common cartridge is acceptable, and vendor must provide a support narrative describing level of support. If the materials are available with common cartridge, please clearly state whether:
    - a. Materials are also available online
    - b. Materials available online are an additional purchase
  - x. If the product is a learning application, it is preferred that the solution integrate with AISD's learning management system (LMS). AISD's current LMS is Canvas. Vendor must provide details regarding their level of integration with Canvas, i.e., what data and how it is passed back if using an LTI.
  - y. All vendors must provide a technical contact for AISD to discuss or ask questions regarding specification responses.
2. Data Storage.
- a. Data must be stored on a secure server with backup and recovery systems in place with access available for extract and download as needed.
  - b. Preferred Database systems include - Oracle 9.1+ and Microsoft SQL Server 2008+
3. Data Accessibility.
- a. The system will provide a web-based interface for accessing data, metrics, and reports.
  - b. Web Based System Utilizing SSL - The system must use Thin Client with screen refresh rates comparable to high speed internet performance (2.5 seconds or less).
  - c. The web-based interface will utilize the District's existing user identification system for secured access to the Software System, data, and reports. AISD uses Microsoft Active Directory services for managing user names and passwords.
  - d. All Web pages must be accessed solely through a secure HTTP connection (HTTPS).
  - e. The Web-based interface will provide standardized and custom query reporting capabilities on any identified basis and by multiple time frames (daily, weekly, monthly, yearly).
  - f. Software must have the ability to create, store, and rerun custom queries/reports.
  - g. The web-based interface will allow the export of reports and raw data to a Microsoft Excel compatible format and directly to Adobe Acrobat.

**b. Personnel Requirements**

- 1. The offeror must have sufficient qualified and available staff to ensure that the software works in accordance with features as detailed in this proposal. The offeror is encouraged to share personnel proposed to establish software.

**c. Installation**

- 1. The offeror will deliver and install all software onsite at AISD facilities.
  - 2. The offeror shall provide their own tools.
  - 3. The offeror will test all software onsite at AISD facilities to assure all components are functioning properly.
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4. The offeror will install and test the system within normal AISD work hours.

**d. Training and Support**

1. The offeror will provide onsite training in the use, monitoring and maintenance of the system to staff identified by AISD.
2. The offeror will provide mentoring and support for at least 60 working days following installation and training. Long term support can be conducted remotely via helpline support. Offeror will clarify how software issues vs. user issues are handled.
3. The offeror will describe user support operations available, including hours of operations.
4. The offeror will describe any additional support that can be provided.

**e. General Requirements**

1. Request that the offeror propose integration options for moving beginning balances when setting up account information from KEV School Cash Suite to new software.
  2. Offeror will list detailed software updates and maintenance, including security protection.
  3. Offeror will list detailed description of: hardware requirements, software features and capabilities, web-based capabilities, audit trail capabilities, password capabilities, history of software upgrades, any significant software deficiencies, technical support options.
  4. Offeror will list detailed bookkeeping record capabilities:
    - a. Processing cash, check, and electronic deposits; issuing checks; transferring funds, monthly reconciliations.
      - i. Provide clarification if custom forms are required for checks, receipts and purchase orders.
  5. Offeror will list detailed reporting capabilities, and include sample reports of:
    - a. Standard monthly reports; quarterly reports; summary reports; custom reports.
    - b. Any other reports proposed, offered or available by offeror.
  6. Offeror will list administrator benefits:
    - a. Software integration will be used District-Wide; administrator will need a centralized database with access to all school level accounts.
      - i. Provide clarification if school level software system utilizes single database, or individual location database.
    - b. Software must be compatible with District's student information system data.
  7. Offeror will provide description of the underlying programming language and how the product should be installed on a network.
  8. Offeror will provide samples of:
    - a. User manual that will be furnished if software is purchased;
    - b. Training materials;
    - c. Software demo CD, if available (preferably a fully functioning demo with an expiration date of no earlier than 60 days).
  9. Offeror will list additional services offered, desired services include:
    - a. Parent Support – Online purchasing transactions
      - i. Electronic student activity fee payments;
      - ii. Electronic payments automatically deposited directly into bank;
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- iii. Ability to attach digital forms to electronic fees;
- b. Sponsor Support – Independently manage without relying on account executive
  - i. Setting up student activity payments online and running reports.

#### **IV. TERM**

The agreement(s) resulting from this solicitation will be in effect for an initial term of one (1) year from the date of award by the Board of Trustees, or such date established by the agreement. The parties by mutual consent may renew the agreement for up to four (4) additional one (1) year periods. In addition, the District reserves the right to extend the contract beyond the final expiration date if necessary, to ensure no lapse in service.

#### **V. PROPOSAL FORMAT**

##### **A. Preface**

The Proposer shall provide an Executive Summary of two (2) pages or less, which gives in brief, concise terms, a summation of the proposal.

##### **B. Proposal**

The vendor's proposal itself shall be organized in the following format and informational sequence:

##### ***Section I – Summary of Experience***

This section shall contain the full name and address of the Proposer submitting the proposal and a brief summary of the Proposer's corporate experience and individual experience for personnel who will provide this product or service.

##### ***Section II - Scope of Service***

A description of services and capabilities as outlined in the Scope of Service and Performance Requirements sections of this RFP, in the order shown. Clearly state any exceptions taken to the specifications of this RFP, or any conditions of the proposal.

##### ***Section III - Financial Proposal***

This section shall contain a straightforward, concise delineation of the Proposer's fees to satisfy the requirements of this RFP. It is the vendor's responsibility to specify all costs (i.e. administrative fees, processing fees, etc.) associated with providing the products or services required herein.

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#### **Section IV – References**

References are to be from government agencies and/or firms, which are substantially serviced by the vendor (references most similar to Austin ISD should be provided). Each reference must contain the reference's name, address, telephone number, and point of contact (including email address). A list of at least three (3) references from current customers must be provided.

#### **C. Required Forms**

Proposer shall execute the following required forms (located on our website: [Required Forms link](#)), and return the **signed original** with the proposal:

- Bid Certification
- Notification of Criminal History of Contractor
- Debarment, Suspension and Ineligibility Certification
- CTPA Adoption Clause
- Interlocal Cooperative Agreement Clause
- W-9 (available at [www.irs.gov](http://www.irs.gov))
- Conflict of Interest Questionnaire (CIQ). The CIQ is prepared by the Texas Ethics Commission, in compliance with House Bill 914, Chapter 176 of the Texas Local Government Code. The form should be submitted on-line at <https://www.austinisd.org/cp/cis/form>.
- HUB Utilization Report – HUR Form (HUBATT 1)

#### **OPTIONAL FORM FOR SOFTWARE PRODUCTS:**

- Software Vendor Certification Form (when applicable)

### **VI. COMPETITIVE SELECTION / EVALUATION**

- A. This is a NEGOTIATED procurement and as such, award will not necessarily be made to the offeror submitting the lowest priced proposal. Award will be made to the firm submitting the best responsive proposal satisfying AISD's requirements, price and other factors considered.
  
- B. AISD will evaluate each Contractor's proposal in the areas of the proposed plan, experience/service capabilities, and best value on the following pre-determined criteria:





**PHASE 1**

<b>Points</b>	<b>Item</b>	<b>Detailed Description</b>
<b>20 Points</b>	Proposed Plan	The adequacy and completeness of the plan offered addressing the Scope of Service.
<b>25 Points</b>	Contractor's Capabilities	The demonstrated ability of the Contractor to provide services, including references.
<b>35 Points</b>	Proposed Products	Quality of items as well as their ability to meet specifications and sustainability requirements and preferences.
<b>20 Points</b>	Financial Proposal	Start-up costs, fixed product costs as well as rebate incentives to determine best value.

**PHASE 2 (optional)**

<b>Points</b>	<b>Item</b>	<b>Detailed Description</b>
<b>35 Points</b>	Proposed Plan	The adequacy and completeness of the plan offered addressing the Scope of Service.
<b>35 Points</b>	Contractor's Capabilities	The demonstrated ability of the Contractor to provide services, including references.
<b>30 Points</b>	Financial Proposal	Start-up costs, fixed product costs, ongoing maintenance fees, etc.

The committee evaluating the proposals submitted in response to this RFP may require any or all contractors to give an oral presentation in order to clarify or elaborate on their proposal as well as to provide a demonstration. Upon completion of oral presentations or discussions, Contractors may be requested to revise any or all portions of their proposals.

## **VII. APPENDICES AND ATTACHMENTS**

- Appendices (Documents included within this proposal):
  - Appendix 1 – Purchasing and Acquisition Vendor Relations Policy CHE-LOCAL
  
- Attachments (Separate documents available to download):
  - HUB Utilization Report (HUR) – HUBATT 1





**Contacting Board  
Members**

Vendors shall not contact Board members individually for the purpose of soliciting a purchase or contract during the restricted contract period.

If a vendor violates this prohibition during this time frame, consideration of the vendor for award shall be invalidated. Board members shall be notified of possible violations and actions taken.

**Restricted Contact  
Period**

The restricted contact period shall begin upon the date of issuance of a solicitation and shall end upon execution of the awarded contract by all parties.

In an effort to demonstrate its commitment to ethical procurement and contracting standards, and to improve accountability and public confidence, all District purchases of goods and services through competitive methods as provided in CH(LEGAL) and CV(LEGAL) shall be subject to a restricted contact period. Except as provided in this policy communication between a vendor and vendor's representative, and a Board member, the Superintendent, assistant superintendent, chief, officer, executive director, principal, department head, director, manager, project manager, or any other District representative who has influence on or is participating in the evaluation or selection process is prohibited.

*Prohibited  
Communications*

A vendor and vendor's representative are prohibited from communications regarding the particular solicitation at issue that are intended or reasonably likely to:

1. Provide substantive information regarding the subject of the solicitation;
2. Advance the interests of the vendor;
3. Discredit the response of any other vendor;
4. Encourage the District to reject a response by a bidder;
5. Convey a complaint about the solicitation; or
6. Directly or indirectly ask, influence, or persuade a Board member, the Superintendent, assistant superintendent, chief, officer, executive director, principal, department head, director, manager, project manager, or any other District representative who has influence on or is participating in the evaluation or selection process, to take action or refrain from taking action on any vote, decision, or agenda item regarding the solicitation at issue.

*Permissible  
Communications*

A vendor and vendor's representative are permitted to communicate with the District regarding the following:

PURCHASING AND ACQUISITION  
VENDOR RELATIONS

CHE  
(LOCAL)

1. Communication to the extent the communication relates solely to a nonsubstantive, procedural matter related to a response or solicitation;
2. Communication that relates solely to an existing contract between a respondent and the District, even when the scope, products, or services of the current contract are the same or similar to those contained in an active solicitation;
3. Communication with the District's Office of Contract and Procurement Services;
4. Communication with the District's Historically Underutilized Business (HUB) Program Department to the extent the communication relates to obtaining a listing of HUB subcontractors and general questions regarding HUB program compliance requirements;
5. Communication between an attorney representing a vendor and an attorney representing the District;
6. Communication with the District in the course of attendance at vendor conference;
7. Communication with the District for the purpose of the District's evaluation of the bidder's proposal, negotiating the scope of work, or engaging in contract negotiations;
8. Communication with the District for the purpose of making a public presentation to the Board; and
9. Communication made during the course of a formal protest hearing related to the solicitation.

*Other Vendor  
Participation and  
Communication*

Regardless of the above time period, a vendor and a vendor's representative who participate in the drafting or development of technical specifications or evaluation criteria for any project are prohibited from competing in the solicitation for such project.

A vendor and vendor's representative shall send all communications, questions, and requests for clarification in writing and addressed to the District's authorized representative identified in the solicitation. The District shall post responses to vendor questions as an addendum to the solicitation.

Nothing in this policy shall prohibit the District's representative from initiating contact with a vendor, in writing, for the purpose of obtaining clarifying information regarding a solicitation response. The vendor's response shall be in writing and shall be provided to the District's authorized representative.

PURCHASING AND ACQUISITION  
VENDOR RELATIONS

CHE  
(LOCAL)

- Complaints* Any person who is aggrieved in connection with a HUB program policy decision may file a complaint in accordance with GF(LOCAL).
- Violations* The following are violations subject to sanctions:
1. Falsely conceal or cover up a material fact or make any false, fictitious, or fraudulent statements, reports, or representations, or make use of any false writing, document, or electronic report knowing the same to contain any false, fictitious, or fraudulent statement.
  2. Fraudulently obtain, retain or attempt to obtain, or aid another in fraudulently obtaining, retaining, or attempting to obtain certification status as a HUB.
  3. Make false reports regarding payments made to subcontractors or sub-consultants.
- Sanctions* Any person who violates the provisions of this section shall be subject to the following sanctions and to the maximum penalties provided by law:
1. The District may bar, suspend, or deem nonresponsive in future District solicitations and contracts, for a period of up to five years, any bidder or proposer, or contractor or subcontractor following notice and an opportunity for a hearing in accordance with the protest procedures in this policy.
  2. The District may, by contract, and where appropriate and lawful, impose an administrative penalty.
  3. In addition to other sanctions available to the District, the violation of any provision of these program rules may be included as an incident of breach in each contract.
- Request for Proposal and Bid Invitation* Each request for proposal and bid invitation shall include a copy of this policy.