AUSTIN Independent School District | Contract and Procurement Services

Request for Proposals
21RFP013 Mass Notification Service
(For Communication in the K-12 School District Environment)

Date	Event
June 23 & 30, 2020	Dates of public notice
July 1, 2020	Due date for questions by 2:00 pm
July 13, 2020	Questions and answers posted on our website
July 21, 2020	**RFP opening / due date at 2:00 pm CST**
July 22 - 29, 2020	Evaluation of Proposals
August 10 - 17, 2020	Interviews and/or vendor presentations/demonstrations
September 2020	Contract negotiation and award

Contact:
Brenda Dalton, Senior Procurement Specialist
Contract & Procurement Services
Phone 512-414-2113
Email: brenda.dalton@austinisd.org

Due to COVID-19 precautions and to prevent the spread of COVID-19, and in an effort to provide ongoing support and services for Austin ISD, the District has decided to accept proposals for **21RFP013 Mass Notification Service** via email to: **brenda.dalton@austinisd.org** no later than **Tuesday, July 21, 2020 at 2:00** p.m. CST.

To ensure a fair and transparent solicitation process and the integrity of submissions:

- All Proposals submitted via email will not be opened until AFTER due date and time.
- Proposals received via email after the specified due date and time shall not be considered.
- Firms must place the following information in the subject line of the email containing your submission: **21RFP013 Mass Notification Service / Vendor Name / Submission Attached**
- Proposals submitted via email should not exceed 20MB. If attachment is more than 20MB, please zip the file or separate it into two (2) attachments and email separate emails with the subject line above.
- Proposals must still be submitted in the specified format and all Required Forms must be signed and submitted with emailed response.
- Submit questions via email to: brenda.dalton@austinisd.org
- In the e-mail subject line, type: *Questions* 21RFP013 Mass Notification Service
- Questions & Answers and addenda will be posted on our website: www.austinisd.org/cp/bids

Checklist and Submission Guidelines

This checklist is provided to help you conform to all form/document requirements stipulated in this solicitation and attached herein.

(This is not a required form, it is not necessary to return this checklist with your proposal.)

I. Understanding the Proposal

Completed

- ☐ Read entire RFP document, appendices and attachments
- ☐ Review AISD Policy and Provisions on our website: Policy and Provisions
- ☐ Attend pre-proposal conference (not required)
- ☐ Submit questions properly before deadline
- ☐ Review addenda, Q&A and other additional attachments
- ☐ Review Proposal Format section of RFP

II. Forms

Completed | Required

- ☐ | ☑ Bid Certification
- ☐ | ☑ Notification of Criminal History of Contractor
- ☐ | ☑ Debarment, Suspension and Ineligibility Certification
- ☐ | ☑ Conflict of Interest Questionnaire (CIQ) – electronic
- ☐ | ☑ Strategic Partner Profile
- ☐ | ☑ EDGAR Vendor Certification
- ☐ | ☑ Software Vendor Certification Form

III. Submitting the Proposal

Completed

- ☐ Prepare the proposal in the format specified and sign all required forms
- ☐ Submit required hard copy marked “original”
- ☐ Submit requested quantity of digital copies 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

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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 Software as a Service (SaaS) for a mass notification service for communication in the K-12 school district environment.

Each Bidder, by submitting its proposal, agrees that the proposal is subject to the Austin ISD Policies and Provisions and agrees to comply with those conditions. Acceptance of a proposal will occur only when a contract is executed. Any contract will incorporate the Austin ISD Policies and Provisions and Standard Terms and Conditions and no commitment exists until a contract is executed by both parties.

II. HISTORICALLY UNDERUTILIZED BUSINESS (HUB) PROGRAM REQUIREMENTS

The HUB Program promotes and strongly encourages the involvement and participation of Historically Underutilized Businesses in District-wide procurements. According to AISD policies CH (LOCAL) and CV (LOCAL), the HUB Program guidelines are not applicable for this type procurement.

III. PROPOSAL FORMAT

A. Preface

The Contractor 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 contractor submitting the proposal and a brief summary of the contractor's 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 contractor's fees to satisfy the requirements of this RFP. It is the contractor's responsibility to specify all costs (i.e. administrative fees, processing fees, etc.) associated with providing the products or services required herein.

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

Contractor shall execute the following required forms (located on our website: Required Forms link), and return the **signed original** via email:

- Bid Certification
- Notification of Criminal History of Contractor
- Debarment, Suspension and Ineligibility Certification
- EDGAR Vendor Certification
- Software Vendor Certification Form (when applicable)
- Conflict of Interest Questionnaire (CIQ). The CIQ is prepared by the Texas Ethics Commission, in compliance with Chapter 176 of the Texas Local Government Code. The form should be submitted on-line at Conflict of Interest Questionnaire - CIQ.

IV. INITIAL REVIEW OF PROPOSALS

Any contractor determined non-responsible or any proposal determined non-responsive will not be evaluated further. The contractor will be notified of a non-responsible or non-responsive determination.

Responsive

In order for a proposal to be responsive:

- ALL required forms listed above shall be signed and included with proposal;
- Proposal shall be received prior to the RFP opening date at the address listed on the cover page;
- Proposal shall respond to the entire scope of service and performance requirements as requested.

Responsible

In order for a proposal to be responsible, the contractor shall be in good financial standing with the Texas Comptroller of Public Accounts.

V. 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.

Consistent with state law and district policy, this RFP does not commit the district to award a contract. The district reserves the right to accept or reject any or all proposals and/or award in whole or in part any proposal if the district determines it is in the best interest of the district to do so.

B. The district anticipates that the evaluation process may include multiple levels of evaluation, as for example, but not limited to:
Phase 1: Initial review of the proposal by the district's evaluation team.
Phase 2: Interviews and/or presentations of top proposals from Phase 1, followed by administrative review of finalist(s) and award recommendation.

PHASE 1

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

PHASE 2

Points	Item	Detailed Description
35 Points	Interview / Presentation	The adequacy and completeness of the plan offered addressing the Scope of Service and Performance Requirements
35 Points	Contractor's Capabilities	The demonstrated ability of the contractor to provide products/services, including references
30 Points	Financial Proposal	Competitive pricing of the various components of the software, training and implementation costs associated with the product(s)

C. 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 and submit a best and final offer (BAFO) for consideration.

D. If the district determines that additional evaluation steps are required to determine the best value between Contractors, the district reserves the right to consider any or all of the following additional criteria; the proposed price, contractor's experience, references and record for responsibility, or any other relevant factor that the district deems necessary to determine best value.

VI. SCOPE OF SERVICE AND PERFORMANCE REQUIREMENTS

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 for an additional time beyond the final expiration date if necessary to ensure no lapse in service.

Program Overview/Background

Austin Independent School District (AISD) is a major urban school district with 82,000 students, 12,000 employees and over 125 campuses and administrative facilities. AISD is seeking proposals for a Software as a Service (SaaS) Mass Notification Service for communication in the K-12 school district environment.

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.

Scope of Work:

The service should include emergency communication, community outreach communication, daily attendance, teacher to parent communication and other configurable notifications in singular and repeating notices. Provide designated users the ability to send telephone, email, and SMS messages to parents, faculty, and all school community stakeholders quickly and efficiently.

Requirements:

The requirements for AISD's Mass Notification System are listed below.

A. System Delivery

1. The proposed system must not require the purchase or installation of any hardware, software, or phone lines, whether onsite or offsite.

2. The proposed system can be accessed, and all functions employed from anywhere using a web browser. Please list supported web browsers and versions. Please note, if the system has a dedicated mobile application.

3. The provider must meet the following Service Level with respect to Call Delivery

   a. Deliver 60,000 30-second messages within 30 minutes or less for Emergency Calls

   b. Deliver 60,000 30-second messages within 1 hour for Normal Calls.

4. The provider must have system redundancies to ensure call delivery, such as multiple telecommunications providers. Please describe.

5. The provider must have system delivery throttling capability so that both emails and phone calls can be throttled to avoid overflowing the local switch network. Describe in detail this functionality.

6. Cite evidence of experience in successful call delivery during times of highly impacted capacity (e.g. hurricane, flood, tornado, fire, or snowstorm) and metrics around it.

7. The provider must state uptime for the system for the past 3 (three) years. Uptime must include scheduled maintenance.

8. The provider must describe its disaster recovery capabilities. Please Describe.

9. System Delivery must comply with all ADA requirements. Please describe accommodations.

10. The selected application must be able to integrate directly with Austin ISD's Transportation software (Tripspark). Data is imported from Tripspark regarding bus routes, riders and riders assigned to a bus for a specific route. Notices will be sent from the mass communication software when needed to inform staff and parents of any Transportation route delays.

B. <u>System Security</u>

1. The provider information security policies are documented and available upon request.

2. The provider must be able to warrant that they provide background checks on all employees, and that only employees who have undergone said background checks will have access to client data.

3. The provider must sign a data sharing agreement with the District agreeing to protect and not release student data to 3rd parties without permission.

4. The provider must offer a call authorization feature that enables two or more authorized personnel to grant permission prior to a district-wide notification.

5. The provider must be able to provide access limitations based upon district roles and give the site system administrator a tool to modify access rights at the individual level. The provider's system must be configurable to provide specific user rights and roles and to restrict data access and administrative oversight to the appropriate personnel.

C. Data Integration and User Provisioning

1. The provider must be able to facilitate unattended, automated and secured contact data upload and update from the institution's existing SIS (Frontline TEAMS) and HR System (Infor Landmark, Talent Management) or other database system. Please describe.

2. Place no limitations on the number of times data transfers can be performed from the district's SIS and HR system.

3. The provider must integrate with our Identity Management system for user and group provisioning. And, must support Single Sign On with modern authentication method, (preferably SAML).

4. The provider must be able to map user roles and permission profiles (as described in requirement B5) using group memberships from our Identity Management System (Rapid Identity – Identity Automation). Please describe your options for doing this.

5. Provide the capability to create User Profiles which authorize or limit access to the features and capabilities of the system. These profiles should be linkable to the group memberships described in C4.

D. System Features

1. The system must be able to send multi-modal messages – phone, email, and SMS messages – to multiple types of devices, including landlines, mobile devices, email inboxes, fax machines, and pagers.

2. The system must have a user convenient 'Opt-in' process for authorizing SMS messages. Opt-in should be accomplished without requiring parents, staff or stakeholders to access the vendor's website to enter information.

3. The provider must allow external systems to integrate via APIs. Describe this functionality.

4. Allow for secure and direct publishing to Facebook, Twitter or other social media.

5. Allow for rich-text HTML enabled emails. This includes copy and paste into the email field from Word or other word processing applications.

6. Allow for inclusion of graphics and/or PDF within the email.

7. Allow the user to attach documents within emails.

8. Allow the creation and use of user created Templates. Templates must be available via web browser and mobile devices.

9. Allow users to select the type of phone message to send – voice, SMS text, or voice and SMS text. The system must offer the ability to deliver messages in the user's own voice, or text-to-speech.

10. Permit use of data fields within email, text to speech or SMS notices. Fields to include personalized contact information such as contact's name, school name, date, library balance, cafeteria balance, grades, periodic attendance or whatever customized "wildcard" content users need to deliver to recipients.

11. Provide the ability to extract home language from a client database field and enable the automatic distribution of messages in a contact's preferred home language. Describe this process.

12. Allow for the quick and easy translation of English-language content into other languages for email, text to speech and SMS messages. Describe this functionality and languages supported.

13. Record and archive messages for future delivery.

14. Provide ability to create, store and share lists and message templates.

15. Provide the capability of creating different message categories…i.e. Emergency, Attendance, Districtwide, Survey, Campus, Band Members, etc.

16. Provide ability for authorized users to easily access different schools for messaging purposes, with only one user account.

17. Provide the ability for users to create multiple custom Caller ID profiles that can be selected during the message creation process, allowing for multiple messages to be sent simultaneously, each with its own Caller ID.

18. Provide the ability for users to create multiple custom Email ID profiles that can be selected during the message creation process, allowing for multiple messages to be sent simultaneously, each with its own Email ID.

19. Allow for the manual creation and automatic import of an unlimited number of recipient groups. Manual creation of groups should support the ability to use .csv or .xls files as the import method.

20. Allow for the construction of dynamic groups that will select all contacts meeting user-designed dynamic criteria at the time of message delivery, ensuring the most up-to-date and accurate message delivery.

21. Provide a call cancellation capability that allows the user to stop an outgoing call in process.

22. Automatically retries unsuccessful phone attempts in order to maximize the number of successful phone deliveries. Describe process.

23. Provide a zero retry option.

24. Provide ability to schedule a recurring message.

25. Provide the option to automatically deduplicate phone numbers and email addresses to ensure the same number is not called or the same email address is not sent to more than once for a given notice.

26. Provide the ability for parents and staff members to establish preferences about what categories of messages (as described in E12) they receive and by which means they prefer to receive them. They should not be able to opt out of “Emergency” calls. They must be able to access the system using a web browser and login credentials/authentication established in D3 to modify these preferences. Please describe fully. Describe any other methods provided (mobile apps, etc) that parents and other users can use to receive messages or update preferences.

27. Provide the ability to add phone numbers and email addresses to a “Do not call” list.

28. Allow the distribution of NOAA severe weather warnings to all available contacts or to specified groups of contacts.

E. Surveys, Classroom Messaging and Confidential Reporting

1. Provide the capability to conduct telephone based surveys. Provide a report platform for surveys.
Please describe fully.

2. Allow teachers to communicate with individual parents and guardians, automatically in their designated correspondence language, with important information regarding their child or children.
Please describe fully.

3. Provide confidential reporting functionality (anti-bullying, mental health, etc) via a two-way communication channel.

4. Provide two-way messaging tools to support the confidential reporting requirement that include send-receive functionality, incoming messages inbox rules, groups and address book tools, and reporting functionality.

F. Reporting

1. Provide graphical and informational reports documenting notification Results.

2. Provide adequate reporting to demonstrate that usage of the notification system supports administrative standards for community outreach, safety plans, and other annual mandated reporting.

3. Allow for the building of customized, post-message reports to better meet the needs of each and every user

4. Provide at-a-glance, real-time progress reports of messages currently being sent.

5. Provide time of completion of all first call attempts, indicating the speed at which themessage reached the majority of phone recipients.

6. Provide history of contact data imports including date, time, a high-level results view and in-depth, downloadable results.

7. Provide recipient-specific message history, delivering results by mode for each message along with a downloadable report that provides comprehensive information for every call and delivery mode for a given Recipient.

8. Provide contact data metrics during the message creation process informing users of the number of modes (phone, email, etc…) associated with the currently selected contacts.

9. All reports will be downloadable in PDF and CSV formats.

G. Call Send Process

1. Provide an intuitive and user-friendly web interface that allows authorized users to quickly create multimodal messages.

2. Provide an intuitive and user-friendly mobile application that allows authorized users to quickly create multimodal messages.

3. Provide a telephone-only access method to send calls if the client is unable to access the web interface for any reason. This process should be simple, secure, and must not require operator intervention.

H. Customer Implementation, Training and Support

1. Present a detailed implementation plan with a timeline from contract signature through user training with clearly identified roles and responsibilities for both provider and client. The plan must be able to be completed within 60 days of the date the contract is signed.

2. Present (during the implementation and training phase) an articulated plan for best practices for use and how the system adheres to existing client protocols for communication.

3. Include initial training for System Administrators and training personnel in stated costs.

4. Provide printed training manuals as well as suggestions for use and best practices as part of the training process.

5. Offer unlimited 24/7/365 support through a toll-free phone number at no additional cost.

6. Our contract for our current system expires on November 1, 2020. The selected system will be required to be in place and be fully functional four weeks before that date to facilitate testing and user training.

Recommendations

We recommend that vendors generate a VPAT™ for any ICT that is intended to be marketed to government agencies. Use the VPAT™ to make specific statements in simple recommended language to demonstrate how the features and functional characteristics of your product meet the Revised 508 Standards.

For more information and VPAT Template download, please visit link below.
https://www.section508.gov/sell/vpat#:~:text=A%20Voluntary%20Product%20Accessibility%20Template,ensure%20the%20deliverable%20is%20accessible.

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):

Appendix 1
Purchasing and Acquisition Vendor Relations Policy CHE-LOCAL

4 pages including this cover page

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:

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.

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.