

August 31, 2022

RFP Number: 4407.3
Due Date: September 27, 2022
Open Time: 2:00 p.m.

To: Prospective Respondents:

The purpose of this Request For Proposal (RFP) is to request, on behalf of the Board of Education of Montgomery County, established providers of student assessment and data management platforms to provide Montgomery County Public Schools (MCPS) with high-quality technology solutions for managing student: assessment creation and delivery, past and present data for use by teachers, school administrators, and central office staff, achievement through identified areas for improvement in professional practice.

A virtual pre-proposal conference will be held on Tuesday, September 20 at 1:00pm via WebEx. All information to connect to the virtual pre-proposal conference is available within the RFP document, Section 13.0. Questions regarding the RFP must be submitted by the close of business, 4:00 p.m., on Friday, September 9, 2022. Responses will be posted on the MCPS Procurement website on Thursday, September 15, 2022.

Please respond according to the instructions provided in the attached. Submissions must be received on or before 2:00 p.m., on Tuesday, September 27, 2022. Submissions received after this date and time will not be considered. Submittals shall be delivered in a sealed envelope with the RFP number, opening date and opening time indicated in the lower left corner of the package. Submissions shall be delivered to Montgomery County Public Schools Procurement Unit, 45 West Gude Drive, Suite 3100, Rockville, Maryland 20850.

The contractor must submit one (1) original, one (1) redacted copy, one (1) electronic version on flash drive and five (5) separate copies of the proposal. The submission must be signed by an official having authority to contract with MCPS. The firm and official's name shall be used. This solicitation does not commit the district to pay any costs incurred in the submission of proposals or guarantee that an award will be made.

In the event of emergency closing of the MCPS Board of Education offices, this RFP will open at the same time on the next regular working day.

Sincerely,



Angela McIntosh Davis, Director
Division of Procurement

AMD
Enclosure

Department of Materials Management
MONTGOMERY COUNTY PUBLIC SCHOOLS

Division of Procurement
45 West Gude Drive, Suite 3100
Rockville, Maryland 20850

Request for Proposal #4407.3, Student Assessment and Data Analytics Platform

1.0 INTENT

The purpose of this Request For Proposal (RFP) is to request, on behalf of the Board of Education of Montgomery County, established providers of student assessment and data management platforms to provide Montgomery County Public Schools (MCPS) with high-quality technology solutions for managing student: assessment creation and delivery, past and present data for use by teachers, school administrators, and central office staff, achievement through identified areas for improvement in professional practice. This RFP seeks providers with those who have proven experience in Pre-K through 12 student assessment and data management platforms (hereinafter “Respondents” or Offerors”) who share a vision for ensuring robust safeguards for safety, security, and privacy of student information. Through this RFP, MCPS intends to solicit written proposals to implement the identified assessment and data management platform throughout the district.

2.0 INTRODUCTION

MCPS believes in creating an organizational culture where equity and excess for all students, staff, and parents/community are achieved. MCPS believes that outcomes should not be predictable by race, ethnicity, or socioeconomic status. In the strategic plan for MCPS are three strategic priorities: Academic Excellence, Well-being and Family Engagement, and Professional and Operational Excellence. In alignment with our strategic priorities, MCPS holds high expectations for all students and staff and ensures that equitable practices are used in all classrooms and workplaces. Our core values include Learning, Relationships, Respect, Equity, and Excellence.

Montgomery County Public Schools (MCPS) is the 14th largest school system in the United States and the largest in the state of Maryland. During the 2021-2022 school year, MCPS served more than 158,000 students from 157 countries speaking 115 languages. With a Fiscal Year (FY) 2023 Operating Budget of approximately \$2.93 billion, MCPS employs more than 24,000 employees. Among the 209 schools that MCPS operates, 42 have received the National Blue Ribbon schools recognition. All 25 Montgomery County public high schools earned spots on the 2021 Best High Schools list, published by U.S. News & World Report. Five ranked in the top 500 nationally, and eight were ranked in the top 25 in Maryland. MCPS has one of the highest graduation rates among the nation’s largest urban school districts, according to an Education Week report.

Additional Information:

209 Schools: 135 Elementary Schools 40 Middle Schools 26 High Schools 5 Special Schools, 1 Alternative Program, 2 Early Childhood Centers	Our Students: Hispanic/Latino: 33.4% White: 25.3% Black or African American: 21.9% Asian: 14.1% Two or more races: 5.0% American Indian or Alaskan Native: 0.2% Native Hawaiian or other Pacific Islander: 0.1%
Services: Students receiving Free and Reduced-price Meals System (FARMS): 39.8% English for speakers of other languages (ESOL): 18% Students receiving special education services: 12.3%	Our Employees: 24,605 Employees 13,745 teachers 87.2% of teachers have a master's degree or equivalent

2.1 CURRENT SYSTEMS

This section outlines the current student assessment and data management platform in MCPS. In addition, there are also student data systems that work in partnership with the assessment and data management platform described in this section. It is anticipated that the modules and functionalities of the partnering student data systems will be maintained as MCPS transitions to the technology solutions implemented through this RFP.

Student Assessment and Data Management Platform:

MCPS currently uses Performance Matters by PowerSchool with the following non-exhaustive list of functions provided for illustrative purposes: Assessment creation and administration, reports used for data analysis, Multi-Tiered Systems of Support (MTSS) intervention documentation. Data is transferred nightly and weekly from the district's student information system and from the data warehouse to Performance Matters, including student schedules, class rosters, student grades, attendance, student program codes, assessment scores, course codes, and custom user files.

In addition to the functionalities described above, the following are examples of other MCPS systems that interact extensively with our assessment and data management platform but are currently under separate contracts and therefore not intended to be included in the RFP:

Student Information System (SIS):

MCPS currently uses Synergy SIS by Edupoint. This is our system for student records. Currently, data is transferred on overnight and regular weekly schedules from Synergy to Performance Matters.

Canvas:

MCPS currently uses Canvas as our Learning Management System (LMS).

Data Warehouse:

MCPS currently uses SQL for its data warehouse for data storage and reporting. The data warehouse interfaces with the various systems that collect data, including Performance Matters.

3.0 SCOPE OF SERVICES

The following list of requirements, although extensive, is not exhaustive and is intended to provide interested respondents with sufficient basic information to submit proposals meeting minimum requirements, but is not intended to limit a proposal's content or exclude any relevant or essential information. Proposals may be submitted for any combination of features and functions listed below.

The scope of services included in this request for proposal is listed in sections 3.1 through 3.5. The proposal should include a detailed explanation of the Respondent's approach to each of the following components:

- Platform Requirements
- Data Transfers -- Import, Export, Integration
- Data Analytics Reporting
- Item and Assessment Creation
- The migration process used to translate district-created items and materials
- Assessment Delivery and Accessibility
- Multi-Tier System of Support (MTSS)
- Integration with current Student Information System (SIS) and Learning Management System (LMS)
- Ability to import data from additional platforms

3.1 PROPOSALS SHOULD ADDRESS THE ENTIRE SCOPE OF SERVICES. REQUIREMENTS INCLUDE:

- a) A platform that supports the creation, delivery, and reporting of district-wide standards-aligned assessments, high-stakes assessments, as well as teacher-created classroom-level assessments on multiple touch and non-touch enabled devices (e.g., desktop computers, Chromebooks, iPads, smartphones) and multiple operating systems (e.g., windows, IOS, Android).
- b) The digital platform, materials, and resources should conform to the standards for accessibility outlined in [Section 508](#) of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794d), and its implementing regulations (36 C.F.R. § 1194). The Revised Section 508 references the Web Content Accessibility Guidelines (WCAG). Web and non-web content (including websites and documents) are required to conform to the most current version of WCAG at level AA to meet Section 508 requirements.
- c) Web-based technology or materials conform to the most current applicable versions of the following standards: [The Web Content Accessibility Guidelines \(WCAG\)](#) at level AA; [Web Accessibility Initiative \(WAI\)](#), Accessible Rich Internet Applications (ARIA)

specification, [User Agent Accessibility Guidelines \(UAAG\)](#) and MathML specification for digital mathematical notation.

- d) Ability to integrate with the single sign-on on through SAML
- e) Multi-Factor Authentication login process.
- f) The system should have the capability to test data transfers and simulate the production experience to work with end-users.
- g) Data transfers
 - i. Data transferable using Secure File Transfer Protocol (SFTP)
 - ii. Data refresh process
 - iii. Exportable data from the platform into MCPS internal data systems
- h) Data analytics reporting:
 - i. Migration of third-party assessments data
 - ii. Reporting functions for district and third-party assessment data
 - Performance bands
 - Data filtering options
 - Data organization in multiple formats
 - Assessment and Item data analysis
 - Dashboard page with interactive graphs and charts of district and school level priority data
 - Customizable reports
 - Visual graphic data analysis tools
 - Item statistical analysis
 - Test Statistics
 - Report downloading and sharing capabilities
 - iii. Ability to compare students results on multiple assessments
 - iv. Ability to view and report archive and current school year data
 - v. Display, sort, and filter options for student demographic characteristics (e.g., gender, race/ethnicity, Individualized Education Plan, 504, English Learners).
 - vi. Ability to display and report multiple school calendar years (e.g., traditional school year, summer school, and year-round options)
 - vii. Ability to display and report multiple student enrollments
- i) User support
 - i. Customizable communication tools to alert users in the platform
 - ii. Process for managing client requests/concerns
 - iii. Accessible user support documents and videos
 - iv. library of web-based help resources that comply with ADA
- j) Assessment and Item creation with editing capabilities
 - i. Ability to incorporate images, PDF, videos within items
 - ii. Allows perfect and partial credit scoring
 - iii. Allows computer and human item scoring capabilities
 - iv. various item types: Multiple choice, Matching, Extended Text, Numeric grid, drag and drop, Graphing, voice response, upload examples of student work
 - v. Rubrics: Rubric bank and Rubric Creation with Rubric scoring of assessment items
 - vi. Assessment search functionality

- vii. Ability to share assessments and items
- viii. Assessment administration formats: Online, scan sheet, paper pencil, data entry, observational, hybrid
 - ix. Options for assigning assessments
 - x. Item statistics reporting including quality, validity, and distractor rationale
 - xi. Available standard-based/common core item banks
 - xii. Ability to add third party item banks to the primary platform
 - xiii. Student testing accommodations features
 - xiv. Ability to create items in multiple languages: English, Spanish, Chinese, and French
 - xv. Ability to change hard coded items
 - xvi. Secure assessment system access for students and district staff utilizing district single sign on
 - xvii. Remote proctoring capability
 - xviii. Online student testing interface
- k) An assessment platform that supports students with varying accessibility and testing accommodations:
 - l) Capability to download online assessments to a paper version
 - m) Capability to provide student feedback
 - n) National, state, and local standards available in the platform
 - o) Online reporting capabilities that track graduation requirements as determined by the Maryland State Department of Education, Montgomery County Board of Education and, ESSA reporting
 - p) Online assessment scoring and reporting available in real-time for both online and paper (scanned) assessments
 - q) Human Scoring and machine scoring options
 - r) Scanning requirements that can be accomplished with HP Multifunction Printer (MFP). Provide list of printer models that are compatible
 - s) Technical support including:
 - i. Dedicated account manager(s) who are responsible for ensuring implementation fidelity and customer satisfaction with MCPS Local Educational Agency (LEA) contacts
 - ii. Unlimited, free access to live, remote help desk during regular school hours, Monday through Friday, for all school and central office-based users
 - iii. Unlimited, free access to 24/7 live, remote help desk for central office-based users supporting the Assessment and Data management platform
 - iv. PC Desktop, Chromebook, smartphone, windows, IOS, android and, i-Pad support
 - t) Defined permission roles for school and district personnel by year
 - u) Ability to create, set up exception-based access, manage assignments, roles, and groups
 - v) Ability to utilize an automated system for assignments based on set criteria
 - w) Item Bank Requirements:
 - i. Minimum of 10,000 items that are aligned to National and state standards including Maryland College and Career Readiness Standards. Standards should include literacy, mathematics, and other contents
 - x) Interactive student performance analysis tools that provide:
 - i. Reporting of assessment performance at multiple levels:

- 1.Student
- 2.Class
- 3.Teacher
- 4.School
- 5.Cluster/Area
- 6.District
- 7.State (where applicable)
- 8.National (where applicable)
- 9.Reporting on traditional ESSA student groups
- ii. Ability to incorporate custom filtering for district needs (e.g., Title 1, gifted and talented, college and career readiness, English Learner, date of birth, Special Ed, 504 plans), Special Ed)
- iii. Apply filters to all reporting features/functions
- iv. Ability create, share, save custom filters
- y) Reporting capabilities:
 - i. Local assessment results
 - ii. State Assessments, District Measures, Grades, etc.
 - iii. Item statistics
 - iv. Archived assessment data
 - v. Item analysis
 - vi. Student profile information (i.e. schedule, demographics, contact information, attendance, grades, test results)
 - vii. Color coding of data
 - viii. Reports can be downloaded and shared in multiple non-proprietary formats, pdf, xls, csv, etc.
 - ix. Reports - static and active options
 - x. Customer ability to build customized reports and links
- z) Multi-tier System of Support (MTSS) and/or Response to Intervention (RTI)
 - i. Creation and monitoring capabilities that support:
 - ii. Intervention groups
 - iii. MCPS assessments
 - iv. Migration of third-party data
 - v. Capability to manually enter and upload data
 - vi. Ability to manage at the school and district levels
 - vii. Reporting integrates with all other reports in the platform

Implementation Project Phases:

The Respondent shall include an implementation proposal with estimated timing for the following project phases with expected full implementation by School Year 2023-2024

Phase 1: Requirements Analysis, Validation of Requirements, Security Analysis, Change Management and, Proposed roll-out Strategy for Implementation, including specific proposals for sequencing of module roll-out, Sequencing of Training plan

Phase 2: Initial Configurations, Customizations, Backups/Disaster Recovery and, Application Integrations

Phase 3: Data Migration and Testing of the application

Phase 4: Initial district Roll-out, including proposed training

Phase 5: Continue Customization and integration of additional functionality, feedback and, evaluation of initial roll-out on phase 4, Testing

Phase 6: Enterprise Roll-out, training, feedback, and, evaluation

3.2 SAMPLE SANDBOX CREDENTIALS

The Respondents shall submit with their proposal response a “sandbox” link of the application and credentials for 30 users for a period of 60 days during the evaluation period to aid in the decision making. Access to any modules included in the proposal must be part of the sandbox.

3.3 TECHNICAL REQUIREMENTS AND VENDOR EXPERIENCE

The vendor shall have proven experience working with elementary, middle, and high school student assessment development, design and, delivery. The MCPS’s objective is to maintain an assessment system that fully aligns with the student information system.

Technology requirements include:

- Regular (daily) and automated updates of student, teacher, course, schedule/roster and, school data from the MCPS Student Information System
- Scanning requirements that can be accomplished with HP Multifunction Printer (MFP). Provide list of printer models that are compatible
- Direct access to vendor technical staff for implementation and maintenance
- Provide immediate documentation/reporting and alerts to central office staff-based users supporting the Instructional Data Management platform
- Alerts & Outage messaging directly to users in platform

In addition, the vendor’s proposal shall provide examples of similarly completed projects, or projects in progress, that demonstrate the responding firm’s expertise and capabilities in each of the above-listed areas. Examples might include, for example, detailed descriptions supported by printed screen shots, references to websites or apps that MCPS will be able to review online, etc.

3.4 PRICING

The Respondent's proposal shall include pricing for each module or service or portion of a module or service that the Respondent is proposing under this RFP. The cost proposal must include a detailed proposal for an initial five (5) year term and two (2) annual extensions, starting with the 2023-2024 school year.

Cost proposals must include:

- a) Price breakdown for each product modules or separate service
- b) Price breakdown for the implementation/project management phases as outlined on the implementation plan

- c) Price breakdown for MCPS hosted managed option as well as provider hosted and managed
- d) Price breakdown for customization (bulk customization packages included), including direct labor and overhead costs, average hourly rate
- e) Price breakdown for professional development/training
- f) Price breakdown for Support/Maintenance Services
- g) Price breakdown for Testing/Quality Assurance
- h) Price breakdown and disclosure of any' overhead cost
- i) Price breakdown for travel and per diem or subsistence cost.

If the Respondent proposes an alternative pricing methodology or schedule, it shall be clearly presented and should provide all of the information specified above.

3.5 TIMELINE FOR IMPLEMENTATION AND KEY STAFF

The vendor's proposal shall propose a plan and schedule for implementation. The proposal shall provide a general timeline and sequence of experiences that will be available to the school district. MCPS desires to begin implementation and staff training during winter of 2023 and for operational use of the proposed assessment system district-wide by August 2023.

In addition, the proposal shall identify key staff members on the project team, describe each team member's relevant experience and describe the role he or she would play in the project. Such key staff shall not be substituted with other personnel or reassigned to another project without prior approval from MCPS.

3.6 DATA PRIVACY AND SECURITY

As specified in more detail in the MCPS General Contract Articles and elsewhere in this RFP, the vendor will comply with all federal, state, and local laws, regulations, and ordinances applicable to this project, including but not limited to the requirements of the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. § 1232g, and its implementing regulations (34 C.F.R. part 99), the Children's Online Privacy Protection Act ("COPPA"), 15 U.S.C. § 6501-6505, and its implementing regulations (16 C.F.R. § 312, et seq.), the Protection of Pupil Rights Amendment, ("PPRA") 20 U.S.C. § 1232(h) and its implementing regulations (34 C.F.R. § 98.1 et seq.), the Maryland Student Privacy Act of 2015, Md. Ed. Code Ann., §4-131, Code of Maryland Regulations (COMAR) 13A.08, as well as applicable Board of Education policies and MCPS regulations, including but not limited to MCPS Regulation AFA-RA, Research and Other Data Collection Activities in Montgomery County Public Schools, MCPS Regulation JOA-RA, Student Records, and MCPS Regulation JFF-RA, Federal Requirements for Use of Protected Student Information.

3.7 TRAINING

The proposal shall describe the initial training and professional development necessary to begin implementation of the proposed assessment and data management platform. The training must include mechanisms to train MCPS system administrators on the set-up, configuration, integration, and customization of the platform. In addition, the proposal shall describe end-user training services and materials for teachers, school administrators, and central services staff who train school staff and provide support district-wide.

The training and professional development plan must be designed to supplement, not supplant, the district's existing approach to professional development that includes: development of district expertise and capacity to manage all aspects of the system, including configuration, customization, maintenance, troubleshooting; development of school and district expertise and capacity to deliver training district-wide, school based embedded support from school and district staff; and development of blended professional learning models that include both face-to-face and virtual learning modules.

Each Respondent's training and professional development digital or online web-based materials for all end uses must be section 508 compliant and meet accessibility guidelines for our MCPS staff with disabilities. Each Respondent's training and professional development plan must include immediate on-site and/or interactive web-based training for MCPS staff so the selected platform can be used for training and use in the spring of 2022-2023 school year, with more interest training during the summer months. The successful Respondent(s) shall work with MCPS to adapt on-site and/or interactive web-based training as needed, and repeat such trainings in the second and third years of the MCPS implementation plan.

3.8 SELECTION PROCESS

It is the intention to award to the most favorable respondent(s) based on the evaluation criteria in Section 11.0. However, the Montgomery County Board of Education reserves the right to make awards according to the best interest of MCPS. This request for proposals may result in multiple awards.

In determining the qualifications of an offeror, MCPS will consider the offeror's record and performance of any prior contracts with MCPS, federal departments or agencies, or other public bodies, including but not limited to the offeror's record providing online digital curriculum services to MCPS or other schools or school districts. MCPS expressly reserves the right to reject the proposal of any offeror if the investigation discloses that the offeror, in the opinion of MCPS, has not properly performed such prior contracts or has habitually and without just cause neglected the payment of bills or has otherwise disregarded its obligations to subcontractors or employees.

MCPS may conduct any necessary investigation to determine the ability of the offeror to perform the work, and the offeror shall furnish to MCPS all such information and data requested, such as information about its reputation, past performance, business and, financial capability and, other factors that demonstrate that the provider is capable of

satisfying MCPS' needs and requirements for a specific contract. MCPS reserves the right to reject any proposal if the evidence submitted by the offeror or investigation of such offeror fails to satisfy MCPS that such offeror is properly qualified to carry out the obligations of the contract and to complete all requirements contemplated therein. Consideration will be given to any previous performance with MCPS as to the quality and the acceptability of bidder's services.

All offerors submitting a proposal shall include evidence that they maintain a permanent place of business. Copies of any appropriate licenses necessary to perform this work shall be submitted with each proposal. Offerors also shall demonstrate that they have adequate staff to perform the required services. Use of subcontractor(s) and/or third-party providers, if any, must be specifically identified within the proposal. Subcontractor and/or third-party provider roles shall be clearly expressed. MCPS reserves the right to accept or reject use of proposed subcontractor(s) and/or third-party provider(s).

MCPS reserves the right to add or delete Contractors throughout the contract term should MCPS determine, in its sole discretion, that there be a need for additional services not available from the awarded Contractor.

4.0 CONTRACT TERM

The initial term of contract shall be five years (5) as stipulated on the RFP. However, the contract may not begin until one day after approval by the MCPS Board of Education and will conclude as stated under the contract term. MCPS reserves the right to extend this contract at existing prices, terms and conditions for up to two additional terms for one (1) year each. Written notice indicating MCPS' intention to pursue the extension of the contract will be issued to the successful vendor 90 days prior to the expiration of the original contract. The vendor shall have ten (10) days from the date of notification to return the notice acknowledging its intent to accept or reject the extension.

Once all responses are evaluated, MCPS staff may make a recommendation to the MCPS Board of Education to extend the contract or decide to rebid. If the contract is extended by the MCPS Board of Education, a contract amendment will be issued.

5.0 CONTRACT TERMINATION

MCPS reserves the right to cancel the contract in whole or in part at any time in accordance with Article 12 of the MCPS General Contract Articles. MCPS also reserves the right to cancel the contract with a Respondent for failure to comply or failure to fulfill the terms of this contract in accordance with Article 13 of the MCPS General Contract Articles.

6.0 REFERENCES

All offerors shall include a list of a minimum of five references who use the firm's digital content, assessments, professional development, and customization services who can attest to the firm's quality of work and, if possible, shall include school districts of comparable

size to MCPS that have utilized the respondents' services. Include names of client, contact person, email address and phone number of all references. Also, as an attachment, offerors shall include a list of all current school district clients.

References may or may not be reviewed or contacted at the discretion of MCPS. Typically, only references of the top ranked short-listed offerors are contacted. MCPS reserves the right to contact references other than, and/or in addition to, those furnished by an offeror.

7.0 FORMAT OF RESPONSE

A complete response must be submitted using the format outlined in this section 7.0 and in the following order. Proposals must also provide an individual response to each RFP specification. Proposals that do not follow this format can result in the submission being considered as non-responsive and not be evaluated further.

- Proposal Section Name
- Section Content Information
- Cover Sheet
- The cover sheet must include:
 - Company Name;
 - Company Address,
 - Company Primary Contact for RFP and MCPS RFP identification Number

Company Background

The company background must include a company timeline and history detailing the amount of time your company has been in business and your commitment to the 1<-1 2 marketplaces. Recent or projected major updates to the software which may include road maps. It must also include and list clients/districts of similar size as MCPS 200+ schools, 20,000+ staff, and 160,000+ student enrollment.

Description of Student Assessment and Data Analytics Platform. Description of platform software must include a high-level overview of the platform being proposed, along with a narrative explanation of your platform's key features as it relates to the components outlined in Section 3.0.

Hardware and Technical Overview

The hardware and technical overview must include recommended hardware, software, storage, operating system, database and any requirements for desktop computers, laptops, chrome books, and mobile devices to access the application as well as browser compatibility. The hardware recommendation must be provided based on the district size of 200+ schools. 20,000+ staff, and 165,000+ student enrollment. The proposal must also include recommended hardware for development/customization and list the different database options available for the application.

Platform Performance. Based on Section 3.1, the proposal must include any benchmark information from school districts of comparable size that utilize the Respondent's services on platform performance including but not limited to the following: guaranteed uptime, system availability frequency of upgrades, problem avoidance techniques, and service level credits for

failure to meet uptime and system availability targets. Respondents must provide benchmark/metric data from a district of comparable size to support their platform performance.

Implementation Plan

Based on Section 3.0, the implementation plan must include information regarding the respondent's implementation methodology, provider and district staffing expectations to support the implementation, and the expected roles of both the Respondent and district staff throughout the implementation process. The plan must also include a proposed timeline for implementation as defined on the project phases of scope of services with or without a pilot phase and known risks associated with the implementation for a district of MCPS size. The respondent may suggest/provide recommendations on adjusted phases of the project for consideration and how to address change management of a large implementation. Specifically enumerate any subcontractors, third party service providers, or affiliated entities.

Security Plan

The proposal must include information on how the proposed solution mitigates against unauthorized access of data and functions within the application on both the desktop as well as the mobile version. The Respondent shall address authentication, authorization- user roles, levels of access to data and function, data encryptions, dual authentication, audit trails and reports available.

Data Conversion Plan

The data conversion plan must outline the data process for the current data analysis conversion methodology and the expected roles of both the Respondent and the district as it pertains to data conversion. The data conversion plan must also detail how the system will handle active and historical records and any limitations on how many years back the application will handle data.

System Interface Integrations

MCPS currently interfaces with multiple systems, the proposal shall address in generic terms how the provider solutions interfaces with other systems, and specifically reference the systems listed in Section 2.1. As part of the gap analysis on phase I of the implementation it is expected that the respondent will customize if necessary the targeted systems to interface with the proposed MCPS systems.

Training/Professional Development Plan

The training/professional development plan must include an overview of the different training options (train the trainer, end user training) available for developers to do customization into the system, system and database administrators, reports development as well as end user training. The plan must also list what materials are available for students.

Quality Assurance and Testing

The quality assurance and testing section must include the provider's proposed approach to testing to ensure a successful migration including but not limited to the following: unit and overall system testing, compatibility testing of different browsers, data migration testing user acceptance and performance testing.

Disaster Recovery Planning

The proposal must include a backup and disaster recovery approach plan. The disaster recovery plan will be revisited during phase 2 of the project to be tailored to MCPS critical business process, infrastructure, data and strategies for recovery in an event of system failure.

Ongoing Maintenance and Support

The ongoing maintenance and support must include the provider's post implementation plan, support model, escalation notification, and expected/guaranteed response time from the support team. The support plan must also include resolution time expectations from the support team and service level agreement information.

Cost Proposal

The cost proposal must include a detailed proposal for a 5-year term starting with the 2023-2024 school year. Cost proposals must include all the information specified in Section 3.3 above.

References

Consistent with Section 6.0 above, the proposal must include a minimum of five (5) references, preferable of current customers in districts the same size as MCPS that have been operating for a minimum of 2 to 3 years. For each reference, the Respondent shall provide contact information specified in Section 6.0 above.

The proposal must also include information on Maryland user groups that may exist. In addition, the proposal must list all current school district clients, see 6.0 References.

Point-by-Point Response

Respondents shall include any and all statements and representations made within its proposal in the contract for services with MCPS. This includes, but is not limited to, the Respondent's point-by-point response to this RFP. If the Respondent responds only "Understand and comply," it is assumed that the Respondent complies with MCPS' understanding of the requirement.

MCPS General Contract Article Exceptions

A list of any allowable variances from or objections to this RFP or the terms and conditions of the MCPS General Contract Articles, as well as a justification for any such variances or objections (a list of non-negotiable terms and conditions are provided in Section 20.0 of this RFP).

Fiscal Report and Required Certifications

Respondent's annual fiscal report in order to demonstrate the Respondent's financial stability (If desired, the Respondent also may include any other financial documents that the Respondent wishes to include regarding Respondent's financial condition).

- Equal Opportunities Certification (Attachment A)
- Certification of Non-segregated Facilities (Attachment B)
- Minority Business Enterprise (Attachment C)
- Non-Debarment Acknowledgement (Attachment D)
- Mid-Atlantic Purchasing Team Rider Clause
- Current Form W-9
- Redacted Copy - A redacted copy of the Respondent's proposal as specified in Section 9.0 and 10.0.

	Company Name & Address	Contact Person	Phone Number
1.	_____		
	Email _____		
2.	_____		
	Email _____		
3.	_____		
	Email _____		
4.	_____		
	Email _____		
5.	_____		
	Email _____		

- 7.1 Response to this RFP shall be submitted in the same order as the RFP and provide an individual response to each RFP specification.
- 7.2 Contractors shall include any and all statements and representations made within its proposal in the contract for services with the MCPS. This includes, but is not limited to, the vendor’s point-by-point response to this RFP. If the vendor responds only “Understand and comply,” it is assumed that the vendor complies with MCPS’ understanding of the requirement.
- 7.3 MCPS shall not be responsible nor be liable for any costs incurred by the vendor in the preparation and submission of their proposals and pricing.
- 7.4 Pricing proposal shall be submitted as a separate document outlining content, timeline for implementation, training, professional development, etc.

8.0 MANDATORY SUBMISSIONS

Each offeror must submit a complete proposal including all required information and attachments. The response shall address each paragraph in the same order as the RFP and provide an individual response to each RFP specification. All proposals must be presented using the same numbering sequence and order used in this RFP document or as otherwise

specified by MCPS. Offerors may request via email to Angela McIntosh-Davis, Director, Division of Procurement at Angela_S_Mcintoshdavis@mcpsmd.org a Microsoft Word version to help them in preparing the response.

One (1) original and five (5) copies as well as one (1) electronic version on a flash drive and one (1) redacted copy of responses must be sent by mail, courier or hand-delivery and shall be in binders with tabs identifying each section. A table of contents should be included and all pages numbered as referenced in the Table of Contents. No faxes or electronic submission of proposals will be accepted. Proposals are to be received no later than 2:00 p.m. on September 27, 2022. Submit responses of the entire RFP proposal to:

Montgomery County Public Schools
Division of Procurement
45 West Gude Drive, Suite 3100
Rockville, MD 20850

Submissions will become the property of MCPS.

The proposal must be signed by an official having authority to contract with MCPS. The firm and the official's name shall be used in the contract process. MCPS reserves the right to make an award without further discussion of the proposals received. MCPS may also negotiate with the one offeror who submits the best proposal or with two or more offerors who are in the competitive range. Therefore, it is important that the offeror's proposal be submitted initially on the most favorable terms from both the technical and cost standpoints. After the submission and closure of proposals, no information will be released until after the award. It is understood that the offeror's proposal will become a part of the official file on this matter without obligation to MCPS.

The proposal must be complete and comply with all aspects of these specifications. Marketing or promotional verbiage will likely overshadow the offeror's qualifications and expertise. MCPS urges the offeror to be specific and brief in their responses.

Offerors must include any and all statements and representations made within its proposal in the contract for services with MCPS unless otherwise agreed upon by MCPS and offeror during negotiations. This includes, but is not limited to, the vendor's point-by-point response to this RFP. If the offeror answers only "Understand and comply" it is assumed that the offeror complies with MCPS' understanding of the requirement.

MCPS shall not be responsible or liable for any costs incurred by the offeror in the preparation and submission of their proposals and pricing.

Complete Response must include:

Point-by-point Response to each section of the RFP
Separate overview of the vendor's product and services as well as a statement explaining their alignment with MCPS curriculum standards.

Pricing Proposal, pricing per student, per year, or by other units that the vendor offers. Pricing proposals can reference supplemental materials such as consumables, professional development options, and service fees, for example.

References, See 6.0 References

1. List of all current school district clients, See 6.0 References
2. Vendor's annual fiscal report in order to demonstrate the vendor's financial stability (If desired, the vendor may also include any other financial documents that Vendor wishes to include regarding Vendor's financial condition. This documentation is not mandatory.)
3. Equal Opportunities Certification (Attachment A)
4. Certification of Non-segregated Facilities (Attachment B)
5. Minority Business Enterprise (Attachment C)
6. Non-Debarment Acknowledgement (Attachment D)
7. Mid-Atlantic Purchasing Team Rider Clause
8. Current Form W-9
9. A list of any variances from or objections to the terms and conditions of the MCPS General Contracting Articles, as well as a justification for any such variances or objections.
10. A separate redacted copy of offeror's proposal as specified in Sections 9.0 and 10.0.

9.0 TREATMENT OF TECHNICAL DATA IN PROPOSAL

The proposal submitted in response to this request may contain technical data which the offeror does not want used or disclosed for any purpose other than evaluation of the proposal. The use and disclosure of any such technical data, subject to the provisions of the Maryland Public Information Act, may be so restricted:

Provided, that offeror marks the cover sheet of the proposal with the following legend, specifying the pages of the proposal which are to be restricted in accordance with the conditions of the legend: "Technical data contained in pages ___ of this proposal shall not be used or disclosed, except for evaluation purposes."

Provided, that if a contract is awarded to this offeror as a result of or in connection with the submission of this proposal, MCPS shall have the right to use or disclose these technical data to the extent provided in the contract.

This restriction does not limit the right of MCPS to use or disclose technical data obtained from another source without restriction.

MCPS assumes no liability for disclosure or use of unmarked technical data or products and may use or disclose the data for any purpose and may consider that the proposal was not submitted in confidence and therefore is releasable. Price and cost data concerning salaries, overhead, and general and administrative expenses are considered proprietary information and will not be disclosed, if marked in accordance with the instructions in Section 11.0.

10.0 PROPRIETARY AND CONFIDENTIAL INFORMATION

Offerors are notified that MCPS has unlimited data rights regarding proposals submitted in response to this solicitation. Unlimited data rights means that MCPS has the right to use, disclose, reproduce, prepare derivative works, distribute copies to the public, or perform publicly and display publicly any information submitted by the offeror in response to this or any solicitation issued by MCPS. However, MCPS will exempt information that is confidential commercial or financial information of an offeror, as defined by the Maryland Public Information Act, State Government Article, Section 10-617, from disclosure. It is the responsibility of the offeror to clearly identify each part of its proposal that is confidential commercial or financial information by stamping the **bottom right-hand corner** of each pertinent page with one-inch bold face letters stating the words “**confidential**” or “**proprietary**.” The offeror agrees that any portion of the proposal that is not stamped as proprietary or confidential is not proprietary or confidential. As a condition for MCPS keeping the information confidential, the offeror must agree to defend and hold MCPS harmless if any information is inadvertently released. Each offeror must submit a proprietary and confidential redacted copy of its proposal to be used in responding to MPIA requests.

11.0 EVALUATION CRITERIA

MCPS reserves the right to ask clarifying questions about submitted proposals. Offerors also may ask questions that they may have related to this RFP prior to submitting their responses. See Section 13.0, Schedule of Events. Only proposals received by the deadline will be considered. Proposals will be screened down to a number of finalists.

MCPS reserves the right to convene a meeting with the top qualified offerors prior to awarding a contract. The purpose of the meeting will be to afford both parties an opportunity to discuss any aspects of the requirements and services that will be performed and clarify any issues. Issues raised during the meeting, which cannot be resolved to the satisfaction of MCPS, shall be cause to reject the proposal. In addition, vendors shall be prepared to provide a product and services demonstration, providing an overview of the proposed product and services at no cost to MCPS. As appropriate, the vendor shall be responsible for the installation of the proposed products and services and any third party software at the District-designated demonstration facility before the demonstration, as necessary. If requested by MCPS, the top qualified offeror or offeror shall provide MCPS with an opportunity to access and review the vendor’s system as in operation at that time, via the Internet from a MCPS computer, to ensure conformity to the requirements of this RFP as well as for the quality and ease of the user interface.

All offerors are advised that in the event of receipt of an adequate number of proposals, which, in the opinion of MCPS require no clarification and/or supplementary information, such proposals may be evaluated without further discussions. Therefore, proposals should be submitted initially on the most complete and favorable terms and conditions. Should proposals submitted require additional clarification and/or supplementary information, offerors should be prepared to submit such additional clarification and/or supplementary information, in a timely manner, when requested

Proposals meeting all requisite criteria will be evaluated. Those who do not meet requisite criteria will not be evaluated further. Selection will be made on the basis of the criteria listed below. The determination of those that are qualified, interested, and available, and MCPS' choice of the best qualified will be based on the following criteria:

11.1.1 Completeness of response

11.1.2 Quality of product and ability to perform and meet MCPS' needs (based on the criteria set forth in this RFP, including but not limited to Section 3.0, Scope of Services).

11.1.3 Qualifications, reputation and experience of the Respondent relevant to the Scope of Services including specific experience in providing products and services to comparable school districts.

11.1.4 Qualifications, reputation, and experience of key staff that will be responsible for this contract.

11.1.5 Past performance as determined by recent and relevant contracts. Evaluation will be based on information obtained from references provided by the bidder as well as other past performance information obtained from other sources known to MCPS.

11.1.6 Terms of contract meeting MCPS required legal requirements.

11.1.7 Pricing proposal and fee structure.

11.1.8 Other key relevant factors included on the scope of services such as implementation timeline aligning to district goals.

A selection committee comprised of MCPS staff and potentially outside stakeholders will evaluate proposals based on criteria.

12.0 SCHEDULE OF EVENTS

The anticipated schedule of activities related to this RFP is as follows:

RFP issued:	August 31, 2022
Questions Due:	September 9, 2022 by 4:00 p.m.
Questions/Answers posted	September 15, 2022 by 4:00 p.m.
Pre-Proposal Conference	September 20, 2022 from 1:00-2:30 p.m.
Proposals Due:	September 27, 2022 at 2:00 p.m.
Anticipated award date:	December 2022

All dates are subject to change at the discretion of MCPS.

13.0 VIRTUAL PRE-PROPOSAL CONFERENCE

A virtual pre-proposal conference will be held from 1:00-2:30pm on Tuesday, September 20, 2022. Anyone interested in attending the pre-proposal conference should plan to join via the Webex link below. **This meeting will be recorded** and will be posted on the RFP Procurement webpage. Questions regarding the RFP must be submitted by the close of business on September 9, 2022 at 4:00pm. Respondents shall provide the names of the persons who will participate. Please have no more than two representatives. Send the names to Ms. Tammy Lyles, Buyer Assistant II via e-mail to [Tammy M Jarman@mcpsmd.org](mailto:Tammy_M_Jarman@mcpsmd.org) no later than September 16, 2022.

WebEx Link: <https://mcps.webex.com/mcps/j.php?MTID=m88914c5c55c024f07e8420a1cc735c83>

14.0 COST PROPOSAL

Pricing Proposal: pricing per consulting hour or project component. Submit a separate pricing proposal for components or deliverable. Pricing proposals should be inclusive of travel expenses and seek to minimize such travel expenses.

15.0 ADDENDA/ERRATA

Changes and addenda to a solicitation may occur prior to the solicitation opening date and time. It is the offeror's responsibility to check the MCPS website under "Event Calendar" <https://www.montgomeryschoolsmd.org/calendar/mcpsbids.aspx> or contact the Division of Procurement at 240-740-7600 to verify whether addenda/errata have been issued. In the event that MCPS issues addenda/errata, all terms and conditions will remain in effect unless they are specifically and explicitly changed by the addenda/errata. Offerors must acknowledge receipt of such addenda/errata by returning one signed copy of each of the addenda/errata with its proposal. Failure to provide the signed acknowledgement of the addenda/errata may result in a proposal deemed non-responsive.

16.0 eMARYLAND MARKETPLACE ADVANTAGE (EMMA)

As of June 1, 2008, Maryland law requires local and state agencies to post solicitations on EMMA. Registration with EMMA is free. It is recommended that any interested supplier register at <https://procurement.maryland.gov/>, regardless of the award outcome for this procurement as it is a valuable resource for upcoming bid notifications for municipalities throughout Maryland.

17.0 MULTI-AGENCY PARTICIPATION

MCPS reserves the right to extend the terms and conditions of this solicitation to any and all other agencies within the state of Maryland as well as any other federal, state, municipal, county, or local governmental agency under the jurisdiction of the United States and its territories. This shall include but not be limited to private schools, parochial schools, non-

public schools such as charter schools, special districts, intermediate units, non-profit agencies providing services on behalf of government, and/or state, community and/or private colleges/universities that require these goods, commodities and/or services. Use of this solicitation by other agencies may be dependent on special local/state requirements attached to and made a part of the solicitation at the time of contracting. The supplier/contractor agrees to notify the issuing agency of those entities that wish to use any contract resulting from this bid and will also provide usage information, which may be requested. A copy of the contract pricing and the bid requirements incorporated in this contract will be supplied to requesting agencies. Each participating jurisdiction or agency shall enter into its own contract with the Award offeror(s) and this contract shall be binding only upon the principal's signing such an agreement. Invoices shall be submitted "directly" to the ordering jurisdiction for each unit purchased. Disputes over the execution of any contract shall be the responsibility of the participating jurisdiction or agency that entered into that contract. Disputes must be resolved solely between the participating agency and the Award offeror. MCPS assumes no authority, liability, or obligation on behalf of any other public or non-public entity that may use any contract resulting from this bid. MCPS pricing is based on the specifications provided in this solicitation.

18.0 INQUIRIES

Inquiries regarding this solicitation must be submitted in writing to Angela McIntosh-Davis, Director, Division of Procurement, 45 W. Gude Drive, Suite 3100, Rockville, MD 20850, via email to [Angela S Mcintosh-davis@mcpsmd.org](mailto:Angela.S.Mcintosh-davis@mcpsmd.org). Questions are due by 4:00 p.m. on September 9, 2022. Responses will be posted on MCPS' Procurement website on September 15, 2022. The Board will not be responsible for any oral or telephone explanation or interpretation by any agent or employee of MCPS. Any binding information given to an offeror in response to a request will be furnished to all offeror as addenda/errata, if such information is deemed necessary for the preparation of proposals, or if the lack of such information would be detrimental to the uninformed offerors. Only such addenda/errata, when issued by MCPS, will be considered binding on MCPS.

Contact by offerors with any other MCPS employee regarding this solicitation until the contract is awarded by MCPS will be considered by MCPS as an attempt to obtain an unfair advantage and result in non-consideration of its RFP response. The MCPS Procurement website address is www.montgomeryschoolsmd.org/departments/procurement/.

19.0 UNNECESSARILY ELABORATE BROCHURES

Unnecessarily elaborate brochures or other presentations beyond those sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the offeror's lack of cost consciousness. Elaborate art work and expensive visual and other presentation aids are neither necessary nor wanted.

20.0 BID PROTESTS

Any bid protests, including appeals, will be governed by the applicable MCPS Procurement Unit Regulations. The burden of production of all relevant evidence, data and documents and the burden of persuasion to support the protest is on the offeror making the protest.

21.0 CONTRACT

MCPS plans to enter a contractual agreement with Respondent(s) to whom the award is made and intends to make MCPS General Contract Articles, attached hereto and incorporated herein as Appendix A, part of the contractual agreement, except and unless modified by MCPS. Proposals must clearly identify any variances from or objections to the specifications in this RFP and the terms and conditions of the MCPS General Contract Articles. Lacking any response to the contrary, MCPS will infer that the Respondent agrees to the specifications of this RFP and each term and condition of the MCPS General Contract Articles. Respondents should note that any variance may provide a basis for MCPS to reject the proposal. **In particular, the provisions set forth in Articles 5, 12-14, 16-18, 21-24, 26, 28, and 29 of the MCPS General Contract Articles are non-negotiable.**

As a note of clarification, Article 19 of the MCPS General Contract Articles applies to any products or services that the Respondent develops specifically for MCPS pursuant to this RFP, not to the Respondent's existing off-the-shelf products and services. MCPS understands and acknowledges that the Respondent retains all intellectual property rights to its existing off-the-shelf products and services and that MCPS will be granted licenses to utilize such products and services.

In addition, with regard to Article 8.D. of the MCPS General Contract Articles, MCPS reserves the right to submit payment in the form of credit card, Single Use Account (SUA), or Automated Clearing House (ACH). The Respondent shall not assess MCPS with any additional charge, fee, or price for the use of these electronic payment methods.

22.0 NOTICE TO BIDDERS

The appropriate items below must be completed as part of the RFP. Failure to comply may disqualify your bid. Type or print legibly in ink.

I. BIDDER INFORMATION: As appropriate, check and/or complete one of the items below.

- 1. Legal name (as shown on your income tax return) _____
- 2. Business Name (if different from above) _____
- 3. Tax Identification Number _____

A copy of your W-9 must be submitted with this bid response.

II. BIDDER'S CONTACT INFORMATION: This will be filed as your permanent contact information.

- 1. Company Name _____
- 2. Address _____
- 3. Bid Representative's Name _____
- 4. Phone Number/Extension _____
- 5. Email Address _____
- 6. Website _____

III. VENDOR'S CERTIFICATION: Upon notification of award, this document in its entirety is the awarded vendor's contract with MCPS. By signing below, the undersigned acknowledges that he/she is entering into a contract with MCPS.

- A. The undersigned proposes to furnish and deliver supplies, equipment, or services, in accordance with specifications and stipulations contained herein, and at the prices quoted. This certifies that this bid is made without any previous understanding, agreement or connection with any person, firm, or corporation making a bid for the same supplies, materials, or equipment, and is in all respects fair and without collusion or fraud.

- B. I hereby certify that I am authorized to sign for the bidder and that all statements, representations, and information provided in this response to the Request for Proposals, including but not limited to the Non-Debarment Acknowledgement, are accurate.

By (Signature) _____

Name and Title _____

Witness Name and Title _____