Request for Information No. I
RFP No. 25/26-01 Artificial Intelligence Platforms
August 7, 2025

Response to Proposers' Questions

1.1   **Question**: How are Ed Tech JPA RFPs run and awarded?

        Answer: Ed Tech JPA offers multiple awards so its members can leverage the vendors that best meet their needs. Ed Tech JPA's RFP team will review Vendor Proposals and award to Vendors who comply with all terms and conditions (no substantial exceptions) and meet all essential requirements. Essential requirements are denoted in the RFP with double asterisks and green highlighting.

        Vendors should also answer non-essential criteria (blue highlighting) to the best of their ability. Ed Tech JPA members vary in size from 1,500 ADA to 600,000 ADA, and have different needs. Ed Tech JPA will make all prevailing Proposals available to members for review. Members will determine what requirements are most important to them and use the information in Proposals to determine which Vendor best fits the needs of their organization.

        Vendors who meet all essential requirements (green, double asterisks) and agree to the terms and conditions will be considered for award contingent upon successful contract negotiations. Non-essential criteria (blue) are optional. Vendors are encouraged to respond to non-essential criteria so member districts can make a determination regarding which solution is the best fit for their needs.

        Additionally, the Functionality and Usability RFP is sectioned into different modules. Except for Section 3.1, essential requirements are required only to be considered for award in those specific sections. Section 3.1 (General) is required for award to any section of this RFP. For example, if a vendor agrees to all terms and conditions and meets all essential requirements for sections 3.1 - 3.4, but not for sections 3.5 - 3.11 they will be awarded for sections 3.1 - 3.4. Below is an example of a possible award scenario.

Vendor	3.1 General *required	3.2 Staff AI Platform	3.3 Student AI Platform	3.4 Intelligent Tutoring System (ITS)	3.5 Multimedia Creation AI	3.6 AI Meeting Assistant	3.7 AI Research Tool/Deep Research	3.8 Custom AI Instance
Vendor A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Vendor B	Yes	No	No	No	Yes	No	No	No
Ven	Yes	No	No	No	No	No	Yes	No

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JPA members have varying needs, and some may require services for only some modules included in this RFP. Members will evaluate Proposals based on their specific needs, so please include a clear description of what your solution offers.

If offering multiple separate solutions please be clear in your proposal which solution meets each criteria by either including separate sections for each product, or differentiating in responses:

Example 1:

3.4 - Product 1 (Intelligent Tutoring System): submit a proposal in response to all criteria

3.6 - Product 1 (Intelligent Tutoring System): no response

3.4 - Product 2 (Meeting Assistant): no response

3.6 - Product 2 (Meeting Assistant): submit a proposal in response to all criteria

Example 2:

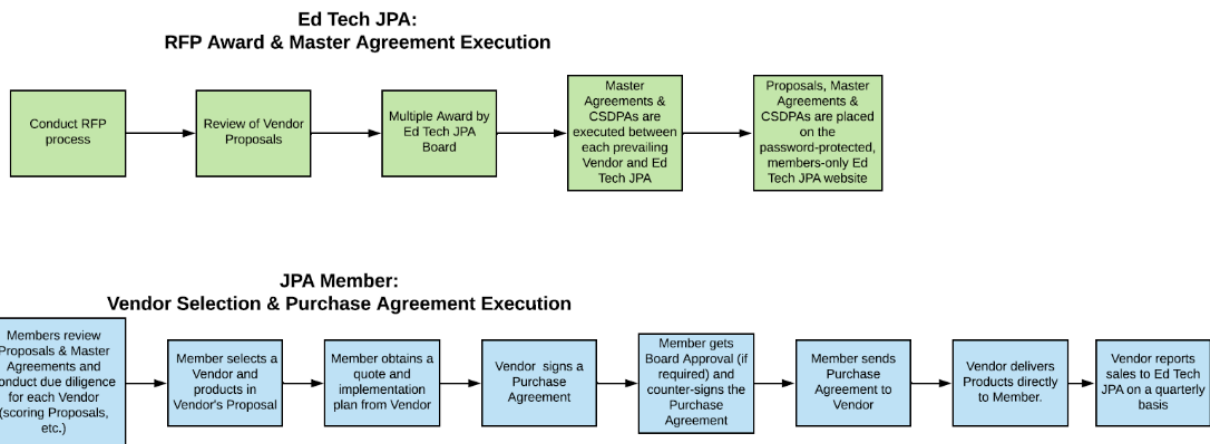| ****2.1.2   Specify whether the Solution is Vendor-hosted (web/cloud-based) or Participant hosted (on-premise). **** |
|---|
| **Product 1 (Intelligent Tutoring System):** *Our ITS solution is web/cloud based…*

 Product 2 Name (Meeting Assistant): *Our Meeting Assistant solution is on-premise….* |

Please also be sure to list each product separately in the Pricing Form.

1.2   **Question**: Are contracts available for future Ed Tech JPA members as well, or just to members at the time the RFP is run?

        Answer: When a member joins Ed Tech JPA it can leverage any current or previously awarded contract. The membership process is very quick and straightforward. There are no fees for members to join. Ed Tech JPA provides sample board agenda and resolution templates for members in an effort to assist members with their boards' required approvals. The Ed Tech JPA Membership site contains detailed instructions for prospective members.

1.3   **Question**: Once the RFP is awarded, how do Ed Tech JPA members enter into agreements with awarded vendors?

        Answer: Prevailing vendors will enter into a Master Agreement with the Ed Tech JPA. When JPA members elect to purchase a vendor's product they will enter into a Purchase Agreement between the vendor and JPA member. Samples of the Master Agreement and Purchase Agreements are included as Appendix A of the RFP. For additional clarity please refer to the illustration below.

Ed Tech JPA:
RFP Award & Master Agreement Execution

Conduct RFP process → Review of Vendor Proposals → Multiple Award by Ed Tech JPA Board → Master Agreements & CSDPAs are executed between each prevailing Vendor and Ed Tech JPA → Proposals, Master Agreements & CSDPAs are placed on the password-protected, members-only Ed Tech JPA website

JPA Member:
Vendor Selection & Purchase Agreement Execution

Members review Proposals & Master Agreements and conduct due diligence for each Vendor (scoring Proposals, etc.) → Member selects a Vendor and products in Vendor's Proposal → Member obtains a quote and implementation plan from Vendor → Vendor signs a Purchase Agreement → Member gets Board Approval (if required) and counter-signs the Purchase Agreement → Member sends Purchase Agreement to Vendor → Vendor delivers Products directly to Member. → Vendor reports sales to Ed Tech JPA on a quarterly basis

1.4   **Question**: Will the meeting be recorded?

    Answer: The Vendor Conference will not be recorded, but all questions and answers will be posted in a RFI on the Ed Tech JPA website.

1.5   **Question**: Is Ed Tech JPA membership open for higher education also?

    Answer: Ed Tech JPA membership is open to higher education organizations as long as they are public agencies. We currently have one member who is a community college district.

1.6   **Question**: If a Vendor does not meet the requirements in an optional section or does not provide that solution, would Ed Tech JPA recommend leaving it blank or noting that the criteria does not apply?

    Answer: If a Vendor does not provide some of the products in the Functionality and Usability sections they may either leave them blank or name a note that it is not applicable. Ed Tech JPA understands that most Vendors will not have a product that meets all Functionality and Usability sections.

1.7   **Question**: Was the Proposal Form in Attachment 1 originally a Word document, and can that be shared with vendors?

    Answer: The Response Template is formatted as a Google Doc and is available at https://drive.google.com/drive/folders/1pyBGncxzhTqcmQEgb_FfAR8vvECjYi0w.   Vendors should download it/Save a copy to their Drive prior to entering information. It can be downloaded/saved in a Word or Google Doc format, depending on Vendor's preferences. Typically vendors submit a PDF file on a thumb drive, along with their hard copies. Please see section 3.2 of the RFP for details related to submission requirements.

1.8   **Question**: When proposing multiple Product categories - is each section evaluated as a whole or separately?

        Answer: The Functionality and Usability sections are scored and awarded separately, but the RFP scoring committee team will read through the entirety of proposals. The RFP scoring committee will have a holistic understanding of submitted proposals. If Vendors respond to multiple sections but one was weaker, the RFP scoring committee will award to the stronger sections that meet the minimum criteria (green, double asterisk). For example if a vendor responds to sections 3.1 - 3.4, but the RFP scoring committee feels 3.4 does not meet the minimum criteria, the Vendor will be awarded for sections 3.1 - 3.3. Failing to meet sections 3.2 - 3.8 will not adversely affect scoring for the other Functionality and Usability sections.

1.9   **Question**: How are awarded products promoted after award?

        Answer: Ed Tech JPA sends a monthly newsletter that includes announcements regarding awards of RFPs, recently finalized agreements, and vendor demos. Ed Tech JPA also has a lot of visibility at key conferences such as CITE and CASBO. We typically present at a session and have a booth at the vendor expo where we provide cards and signage to vendor partners. We also provide lists of awarded solutions and vendors to attendees. Our board also makes presentations about the JPA and provides lists of awarded vendors to additional groups they are involved with, such as local CITE groups, and the Small School District Association.

Ed Tech JPA's board is also willing to present at vendor hosted events.

1.10   **Question**: Can annual price uplifts be built in? How does that work within the five year term?

        Answer: Ed Tech JPA understands that pricing may be subject to annual uplifts. This is a formal procurement, so all pricing must be transparent. The Pricing Form includes a column on the right side for Vendors to include annual uplifts. Additionally, Section 9 (Minimum Price Guarantee) of the Master Agreement addresses adjustments due to inflation.

1.11   **Question**: Are there any particular instructional priorities or use cases that you are hoping to address?

        Answer: Ed Tech JPA represents a large and varied number of local educational agencies. Our members have diverse needs related to Artificial Intelligence Platforms. Members of our Board, representing multiple educational agencies, have expressed a desire for tutoring solutions, operational efficiency tools, and solutions that help teachers with lesson plan creation and differentiation in the classroom.

Irvine Unified School District is the initiating district and currently has an AI steering committee that is starting pilots of some products this year. Irvine USD has a high interest in each of these tools that meet criteria for Functionality and Usability sections: 3.1 (General), 3.2 (Staff AI Platform),and 3.3 (Student AI

Platform).   Irvine USD does not currently have immediate interest in section 3.4 (intelligent Tutoring System - ITS).

1.12   **Question**: For services that are not defined or sized, will you be looking for a labor catalog with the appropriate skills ?

     Answer: Vendors should respond with existing solutions that meet the required criteria (green with double asterisks). Ed Tech JPA understands that Vendors may offer services that are not covered in standard licensing costs (for example: customization, consulting, service, labor, etc). Hourly rates for services and labor may be included on the Pricing Form.   The Pricing Form includes sections for Implementation costs, Training Costs, Other costs, and Optional Services/Solutions, in an effort to allow Vendors to include all costs.   All costs must be included in the proposal, and pricing should be transparent and easy for members to understand.

The pricing form is designed to allow Vendors to capture a variety of pricing approaches including per-student and per-FTE models. Additionally, time and materials pricing (such as a standard rate for custom development or training) are common on our RFPs. Some vendors may also approach pricing as a standard discount off of list pricing. This approach (discount of list) is acceptable if Vendors' list pricing is included in the RFP response, and/or publicly available.

1.13   **Question**: This model fascinates me. I work with the exec directors at CUE / ASU GSV. We should chat off line about presenting this model at both conferences.

     Answer: Unfortunately Ed Tech JPA's team is not able to connect with individual Vendors during the open RFP period. We are able to discuss presentations after the RFP has been awarded. However, if that timeline is problematic, you are welcome to refer your contacts for those events directly to the Ed Tech JPA for direct conversations about presentations and exhibitor opportunities.

1.14   **Question**: What are some common pricing structures that you see?

     Answer: Vendors typically propose pricing based on a per user/staff/student, or flat rate. Please be clear in the Pricing Form regarding Cost and what the Unit Cost is (Ex: $5 per student per month OR $20/user/year).   Please feel free to add additional lines as desired. Please see response to RFI 1.12 for additional information.

Often Vendors propose tiered costs based on specific numbers of students/users (Ex: Tier 1: 1- 1,000 Users Tier 2: 1,001 - 5,000 users, Tier 3: 5,001 + users).

If you have specific questions about the Pricing Form, or other subjects please send us those questions in writing by 12:00pm on September 16, 2025 and we can respond through the RFI process.

1.15   **Question**: It sounds like I might have just missed a conversation about the financial details of the RFP?

   Answer: The Pricing Form is built to be flexible. If you have specific questions about the Pricing Form, or other subjects please send us those questions in writing by 12:00pm on September 16, 2025 and we can respond through the RFI process.

Vendors are charged an Admin Fee based on sales (similar to CMAS and NASPO). The intent of the Administrative Fee is to assist Ed Tech JPA in covering operating costs, including the cost to advertise the RFP, as well as staff time and legal costs associated with the development, administration, and negotiation of the RFP and resulting contracts. The Administrative Fee is not intended to create a profit to Ed Tech JPA or any of its members. Ed Tech JPA has assumed significant operating costs, and hopes that in future years, as we continue to grow and have abated the start-up costs, the Board will be able to lower the Administrative Fee. Since its inception Ed Tech JPA has lowered the Administrative Fee by half a percent, and also for vendors with individual sales of three hundred thousand dollars and above ($300,000.00) as follows:

Individual Transaction Amount	Administrative Fee
Under $300,000.00	3.5%
$300,000.00 and above	3%

1.16   **Question**: Is there a due date for questions?

   Answer: The due date for Request for Information (RFI) submissions is September 16th at 12:00pm. Please submit questions to EdTechJPA@iusd.org . Ed Tech JPA publishes all questions and answers as RFIs on the website. Please do not send confidential questions. Ed Tech JPA typically redacts vendor names from questions, but is required to make all information available to all vendors.

1.17   **Question**: If we add a new product after award do we have to wait until the next five year cycle to include it?

   Answer: If Vendors release a new product that is related to the awarded product Ed Tech JPA has the flexibility to incorporate the new product in an amendment to the Master Agreement. Ed Tech JPA has worked closely with our legal counsel to develop section 8 of the Master Agreement to address this scenario.

If Vendors release a new product that is not related to the awarded product (ie: not an Artificial Intelligence platform), it cannot be added to the resulting agreements from this RFP. In this case vendors should respond to a different RFP for the new product.

1.18   **Question**: If a district wants to pilot or explore the tool before entering into an agreement is that an option beforehand?

      Answer: Ed Tech JPA understands that vendors and members may want to enter into pilots prior to making final decisions. In the event of a pilot Ed Tech JPA allows for flexibility related to pricing (ie: you do not need to charge members the full proposed cost for pilots). Please keep in mind that members will still need to enter into data privacy agreements, and Purchase Agreements may be required, depending on the needs of member's boards and Vendor's requirements for liability purposes.

1.19   **Question**: Are Vendors prohibited from contacting districts during the RFP or are there restrictions?

      Answer: The Ed Tech JPA is unable to speak individually to Vendors during the open RFP process. However, Vendors are not prohibited from routine sales conversations with Ed Tech JPA's 210 members.

Vendors and Members may not discuss details about the RFP that are not public knowledge (ie: already posted on the website). For example, Vendors cannot call directors or member staff to ask about a specific RFP requirement.

All communications with Ed Tech JPA must be submitted through the RFI process to EdTechJPA@iusd.org. Ed Tech JPA will post responses to questions as we receive them, typically a few days after receipt.

1.20   **Question**: Are we required to submit a completed Master Agreement and Purchase Agreement?

      Answer: Ed Tech JPA does not expect Vendors to submit completed Master Agreements or Purchase Agreements. They are included for Vendor's review, but Ed Tech JPA does not need completed agreements or redlines submitted with the proposal. Vendors may include expected redlines in section 5 (Exceptions), but are not required to. All awards are made contingent upon contract negotiations, and our team and legal counsel have experience negotiating contracts after award.

Appendix B (Required Forms) and Appendix D (Pricing Form) are required to be submitted along with the proposal.

Appendix C (Federal Certificates) is required by some Ed Tech JPA members, but is not required for award.   Appendix D (Supplementary Materials) is available for Vendors to include additional documentation, but is not required for award Appendix F (Student Data Privacy Agreement) is not required for award and will be finalized after award along with the Master Agreement and Purchase Agreement.

1.21   **Question**: Are all task orders/opportunities made visible to all awardees?

        Answer: All awarded agreements are made available to all Ed Tech JPA members. Members are notified when RFPs are awarded. Proposals, Clarifying Questions, agreements, ,and vendor contacts are posted on members-only password-protected webpages. Members access these websites to review and score proposals and to obtain copies of agreements.

Ed Tech JPA members do not have access to each other's orders and/or agreements. However, please keep in mind that all quotes and agreements may be subject to the California Public Records Act.

1.22   **Question**: Since we don't have 3 references, we won't attend or bid on this proposal. This is a new subject in the field, and we only have done 1 prior work in this area.

        Answer: Vendors who do not have three references for their AI product may submit references for their related or similar products and/or in-progress implementations. During scoring Ed Tech JPA's RFP scoring committee will determine if the references meet the criteria.

1.23   **Question**: For pricing purposes, how many students are expected to use this solution?

        Answer: Ed Tech JPA represents a large and varied number of local educational agencies. Ed Tech JPA members vary in size from 1,500 ADA to 600,000 ADA, and have different needs. Vendors may provide pricing per student or per staff member to accommodate the varied sizes of our members' organizations. For more information on pricing structure, please see the response to RFI 1.12 and 1.14.

1.24   **Question**: When is the anticipated award date?

        Answer: Ed Tech JPA anticipates awarding responsive and responsible vendors at its January 29, 2026 board meeting. Dates are subject to change. Please view the Calendar of Events on the website for current dates.   https://edtechjpa.org/rfp-no-2526-01-artificial-intelligence-platforms.   Ed Tech JPA developed the schedule for this RFP to align with schools' typical budget development and new-year purchasing/contracts timelines.

1.25   **Question**: Is this awarded to multiple vendors or a single?

        Answer: Ed Tech JPA offers multiple awards so its members can leverage the vendors that best meet their needs. Please see RFI 1.1 for additional information.

1.26   **Question**: Is the district looking for any particular content area for the solution?

        Answer: Ed Tech JPA represents a large and varied number of local educational agencies. Our members have diverse needs related to Artificial Intelligence Platforms. Please see 1.11 for additional information.