

**Request for Information No. I**  
**RFP No. 23/24-04 Electronic Document Routing Solutions**  
*November 3, 2023*

**Response to Proposers' Questions**

1.1 **Question:** I'd love to hop on a call with you and potentially discuss a partnership with you not only for this RFP but for further opportunities as well.

**Answer:** Unfortunately we are unable to discuss the RFP directly with vendors. All communications must follow the RFI process outlined in section 3.8 of the RFP.

1.2 **Question:** Can we send questions to you now to be answered during the call?

**Answer:** Requests for Information can be sent at any time during the RFI period and will be answered through RFIs posted on the website. Ed Tech JPA does not typically read a list of questions during the Pre-Proposal Conference Call, and attempts to make it a place where vendors can ask questions.

1.3 **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 section of the RFP is sectioned into different modules. Essential requirements are required only to be considered for award in those specific sections. 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 - 3.9 they will be awarded for sections 3.1 - 3.4. Below is an example of a possible award scenario.

Vendor	3.1 User Experience/Interface	3.2 Form Capture & Processing	3.3 Form Searching	3.4 Workflow	3.5 Mobile Access	3.6 Security	3.7 Form Delivery & Distribution	3.8 Web Based Forms	3.9 Scalability
Vendor A	Yes	Yes	Yes	Yes	No	Yes	Yes	Yes	Yes
Vendor B	Yes	Yes	Yes	Yes	No	No	No	No	No
Vendor C	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes

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.

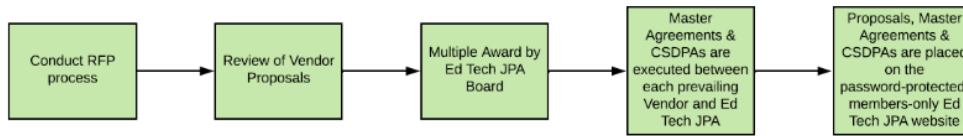
1.4 **Question:** Are contracts available for future Ed Tech JPA members as well, or just to members at the time the RFP is run?

**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.

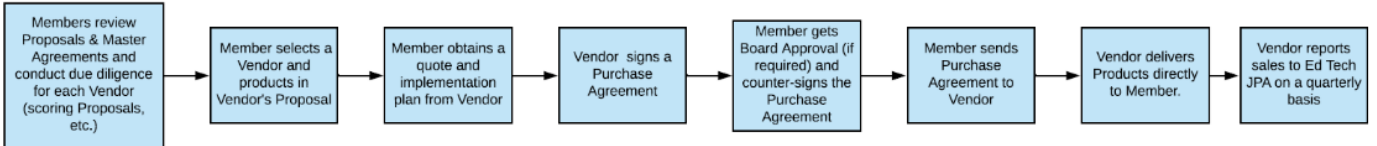
1.5 **Question:** Once the RFP is awarded, how do Ed Tech JPA members enter into agreements with awarded vendors?

**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**



**JPA Member:  
Vendor Selection & Purchase Agreement Execution**



1.6 **Question:** Why is Ed Tech JPA releasing a new RFP, when there are already Electronic Document Routing Solutions agreements awarded under the previous Ed Tech JPA RFP from 2019?

**Answer:** Ed Code section 17596 limits contract terms to a maximum five (5) years. The previous RFP for Electronic Document Routing Solutions was awarded in May 2019. Releasing this RFP allows for award and contract negotiations with responsive vendors with no lapse in contract availability for an electronic document routing solution for Ed Tech JPA's members.

1.7 **Question:** When a vendor is awarded, in what ways does this simplify the procurement process? Will this shorten the timeline for board approval?

**Answer:** Contracting with Ed Tech JPA helps streamline the procurement process. By leveraging an Ed Tech JPA Agreement, vendors and their customers do not need to conduct a separate RFP or procurement process. They also do not need to engage in separate contract negotiations. After award, Ed Tech JPA and a vendor will negotiate a Master Agreement, Purchase Agreement, and Data Privacy Agreement. The Purchase Agreement is a template agreement Vendors use directly with the Member/customer and should include an Exhibit with Vendor's Quote and any implementation information. Vendors should provide prospective customers with a Quote and finalize the previously negotiated Purchase Agreement.

Members may require board approval to leverage a Purchase Agreement, depending on the needs of the Member. Please see RFI No. 1.5 for additional information.

Ed Tech JPA attends conferences and sends regular updates and newsletters to its members to market available contracts. Our goal is to increase exposure and simplify the procurement process for members and vendors.

1.8 **Question:** Since you mentioned that this was a renewal, is the list of currently awarded vendors for the previous RFP publicly available?

**Answer:** Previously awarded vendors for the 2019 Electronic Document Routing RFP were: Companion Data Services, LLC dba docfinity and Emics, Inc dba Informed K12. Documents from the previous RFP (including an Intent to Award and Resolutions) can be viewed at <https://edtechjpa.org/rfp-1819-04-electronic-document-routing-solution>. A list of all awarded vendors can be viewed at <https://edtechjpa.org/services/jpa-contracts>.

1.9 **Question:** Is there a limit on how many vendors will be awarded for this RFP?

**Answer:** No. Given the diverse nature of the JPA members, Ed Tech JPA does not have a limit for the number of vendors awarded. Typically more than one vendor is awarded, but we've also had instances where we awarded to a single vendor.

1.10 **Question:** If a Vendor has more than one solution that may be applicable to a proposal, could they propose multiple solutions?

**Answer:** Yes, If offering multiple separate solutions please be clear in your proposal which solution meets each criteria:

**Example:**

**\*\*2.1.5** Specify whether the Solution is Vendor-hosted (web/cloud-based) or Participant hosted (on-premise).

**Product 1 Name (Form Creation):** *Our form creation solution is web/cloud based...*

**Product 2 Name (Form Distribution):** *Our form distribution solution is on-premise....*

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

1.11 **Question:** Can two complimentary vendors collaborate and submit one proposal?

**Answer:** Two Vendors may submit one joint proposal, however the proposal would need to be submitted under one Vendor's name. Ed Tech JPA would need to award to one Vendor, resulting in contracts with the submitting Vendor. Members who wish to purchase the Solution would be required to issue POs and payment to the Vendor who is awarded and is a party to resulting contracts.

1.12 **Question:** Are there any special points/preferential treatment for local small businesses located in Orange County?

**Answer:** Ed Tech JPA does not take location or small business status into account when awarding. Member districts have diverse needs, rules, and regulations. Additionally Ed Tech JPA Members are located in various locations throughout the country. We encourage Vendors to include this type of information so Members can consider it when reviewing the proposals of awarded Vendors to determine which product(s) meet their needs.

1.13 **Question:** Do you allow Vendors to redline the agreements during the proposal process or during negotiations later on?

**Answer:** Yes. Vendors will be able to negotiate the agreements following the award. Redlines that are not consequential (don't apply to your company) can typically be negotiated relatively quickly. Substantive redlines can take time to negotiate. Awards are made contingent upon successful negotiations, and awards may be redacted if the parties cannot come to an agreement. Ed Tech JPA understands that Vendors may have contractual and legal requirements and strives to work with Vendors to negotiate terms and conditions. Ed Tech JPA also has standard exceptions to Minimum Price Guarantee for legacy customers and other situations.

1.14 **Question:** Can you provide more context as to what Clovis USD is looking for in the RFP?

**Answer:** Clovis USD has various forms they use internally (Ex: requests for credit cards, requests for a field trip, request for a new vendor). A majority of forms have been created internally. The forms have multiple steps for approval (HR, Payroll, etc). Forms are routed to appropriate personnel to complete the approval process.

1.15 **Question:** Does Clovis USD typically involve IT and require professional services when creating new processes, or is this largely self-administered by individual departments?

**Answer:** Clovis USD's electronic document routing is typically self-administered by individual departments and departments do not involve IT. Typically two or three people in each department have administrative rights to edit forms.

Please keep in mind that there may be a wide variety of needs within Ed Tech JPA's members. We recommend speaking to your product's strengths in the Proposal, rather than tailoring a proposal based on one Member's needs. If a Vendor offers different levels of support/Solutions you may offer them (please refer to RFI No. 1.10 if planning to offer different solutions).

1.16 **Question:** What is the current method IUSD uses to manage insurance for student devices?

**Answer:** Currently IUSD runs a self-insurance program for devices which has proven a better solution for IUSD. IUSD currently uses MySchoolBucks to process payment for the self insurance program. IUSD may consider other forms and tools in the future.

Please keep in mind that there may be a wide variety of needs within Ed Tech JPA's members. Ed Tech JPA recommends speaking to your product's strengths in the Proposal, rather than tailoring a proposal based on one Member's needs. If planning to offer different Solutions please refer to RFI No. 1.10.

1.17 **Question:** What are some of the damages IUSD typically sees to devices?

**Answer:** Some damages IUSD typically experiences in its Chromebook fleet are: broken screens, keys, and power cords, and batteries that fail. IUSD's Chromebook fleet is approximately 60,000 devices. IUSD can typically scavenge spare parts from other Chromebooks to use in damaged devices. IUSD also contracts with a company for additional spare parts. IUSD's total cost last year for repair parts and services was under approximately \$25,000.

Please keep in mind that there may be a wide variety of needs within Ed Tech JPA's members. IUSD's experiences may not be the norm; In a recent meeting other districts expressed higher incidence rates, lack of in-house staff, etc and a need for additional support. If you have a forms process or insurance process regarding device repairs you may bundle it into your proposal. Ed Tech JPA recommends speaking to your product's strengths in the Proposal, rather than tailoring a proposal based on one Member's needs. If planning to offer different Solutions please refer to RFI No. 1.10. You can view all members at the EdTech JPA website. <https://edtechjpa.org/about/our-ed-tech-jpa-members> .

1.18 **Question:** Throughout our response and documents being submitted, should the customer be "Clovis Unified School District", or "Education Tech JPA" ?

**Answer:** Ed Tech JPA is the entity issuing and awarding the RFP. Responses should reference Ed Tech JPA Members and/or Ed Tech JPA Participants. Clovis Unified School District is one of Ed Tech JPA's 159 members and would be included in the reference to all JPA Members. Participants are Ed Tech JPA Members who elect to purchase the Solution.

1.19 **Question:** Was yesterday's call recorded and can I get a link to the recording?

**Answer:** Ed Tech JPA does not record Pre-Proposal Conferences, but questions and answers have been transcribed herein so all Vendors have access to the same information.