Request for Information No. II
RFP No. 25/26-02 Facilities and Resource Management
September 4, 2025

Response to Proposers' Questions

2.1 **Question**: 1.4.1, 1.4.2, 1.4.6 – Could you clarify if there are any non-negotiable hard deadlines within the implementation timeline that must be adhered to, such as phased rollouts or eventual launch/cutover dates?

Answer: Criteria no. 1.4.1 asks that "Vendor acknowledges and confirms compliance with all processes and requirements defined in RFP Section 2.00: Purchase Agreement Implementation Process. Identify any exceptions or deviations from the proposed project approach, site access requirements and Vendor expectations". Section 2: Purchase Agreements, Payments & Order Fulfillment is included on pages 9 -11 of the RFP and addresses the Purchase Agreement, Ordering Process, Purchase Agreement Implementation Process, and Subscription-based Licensing, Bundling, and Additional Services specific to purchases made through an award based on this RFP. This is not specific to individual purchases made by Ed Tech JPA members.

Criteria no. 1.4.2 asks that "Vendor confirms that it will provide Participants with a written implementation plan with specific dates no later than two weeks after receiving notification from Participants unless a later date is agreed to by both parties. Participants will not be required to implement Vendor's Solution until after approving the implementation plan, obtaining Participant Board approval, and upon full execution of the Purchase Agreement". When a Participant contacts Vendor any non-negotiable hard deadlines within the implementation timeline, such as phased rollouts or eventual launch/cutover dates should be discussed. Details related to a Participant's order and timeline should be included in the Purchase Agreement Exhibit A: Order Information and Implementation Plan.

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. Participants will have different needs related to implementation timeline, such as phased rollouts or eventual launch/cutover dates.

Criteria no. 1.4.6 asks Vendors to "Provide a general project plan that includes implementation of the proposed Solution. Include a general outline of essential tasks/milestones and the estimated timeline for implementation". Vendors should provide a general project plan showcasing how they typically implement the Solution.

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2.2 **Question**: 1.5.2, 1.5.3 – How many internal staff and system administrators do you anticipate will require training in the first year?

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. Participants will have different internal staff and system administrators that will require training in the first year. Vendors should respond with their standard implementation and training processes.

2.3 **Question**: 1.1.11 – Are there any certifications or credentials (such as FedRAMP or Digital Promise) that the vendor is preferred to hold for RFP consideration?

Answer: Vendors are not required to have any certifications or credentials for an award by Ed Tech JPA. This criteria allows Vendors to share any information they feel will be helpful to Members when scoring proposals for their individual needs.

2.4 **Question**: 2.1.1 Data Storage – Can you provide the current volumes for both work orders and service management tickets, as well as the timeframe those were accumulated over? Also do you want any of this prior information imported/migrated into the new platform for historical reference?

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. Participants will have different volumes for both work orders and service management tickets and preferences related to imports and migrations. Vendors should respond confirming whether the Solution is "designed to anticipate and provide for increases in data storage needs, increasing size and scope of data sets on-line, and increasing number of users" .

2.5 **Question**: 2.3.1 Maintenance Windows – Is there a preferred day/time for downtime that fits K–12 operations?

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. Participants will have different preferences related to preferred downtime. Typically K-12 prefers that downtime not occur during business hours. Vendors should respond with their existing practices and Members can weigh them when scoring responses.

2.6 **Question**: 2.4.3 Authentication – What authentication platform(s) does your organization currently use (Active Directory, Google SSO, multifactor authentication)? Do you have specific integration or security requirements for identity management of users logging into the new system?

Answer: Criteria 2.4.3 asks Vendors to "Please specify which platforms Vendor's proposed Solution integrates with for authentication/authorization (Active Directory, Google Single Sign On, etc.)". 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. Participants will have different authentication platforms and security requirements. Vendors should respond with the authentication platforms the Solution currently uses.

2.7   **Question**: 2.4.4 Integration – Please provide details about existing incumbent systems you currently use for work orders, ticketing, calendaring, payment processing, digital displays, and financial systems. Are all of these being replaced or is there an expectation to integrate with any of them?

       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. Participants will have different incumbent systems and plans regarding use or replacement. Vendors should respond by providing lists of products the Solution has existing integrations with.

2.8   **Question**: 2.5 – Regarding Exhibit B "Schedule of Student Data," can you clarify what student or participant data you expect will be stored in the eventually chosen system?

       Answer: Exhibit B: Schedule of Student Data is an Exhibit to the Standard Student Data Privacy Agreement (DPA) as developed by the Student Data Privacy Consortium and Fagen, Friedman & Fulfrost LLP. Vendors should respond by including all data the Solution may have access to. Typically Vendors are aware of the typical student data entered in their Solutions. If no student data is anticipated Vendors may check the last box in Exhibit B.

2.9   **Question**: 2.5.10 – Are there additional data privacy or residency requirements beyond the CA-NDPA standard, such as local or federal data sovereignty or protection laws?

       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. Participants may have different requirements related to additional data privacy or residency requirements. Vendors should respond confirming whether they will execute and abide by the DPA.

2.10   **Question**: 2.5.11 – What are your expectations around Artificial Intelligence (AI) use in the system, specifically regarding participant/student data?

       Answer: Ed Tech JPA Members are local educational agencies and must protect student data. Members and Vendors must abide by all relevant data privacy laws. Please see the DPA for additional details.

Vendors who use AI should respond to criteria 2.5.11.1 and 2.5.11.2 regarding how their Solution uses Participant data and student data.

2.11   **Question**: 3.1.58–3.1.69 Reporting – What reports are currently desired by the District? To what granularity do you require role-based controls for visibility of resource attributes, photos, and maps that differ between internal and external requesters?

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. Participants will have different desires related to reports and granularity. Vendors should respond with the Solution's current capabilities.

2.12   **Question**: 3.2.3 Unavailability Details – Should end users see specific causes (e.g., "IT issue") or generic "Unavailable"?

Answer: Criteria no. 3.2.3 asks Vendors to "Describe what details internal users can see when a resource is unavailable and to what extent this is customizable (Ex: See that the pool is unavailable because there is a swim meet, because an external requester has reserved it, because of re-surfacing, or due to cleaning)".

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2.13   **Question**: 3.3.x External Access & Payments – Should external requests include payment processing, or is that optional functionality?

Answer: Green criteria with double asterisks related to invoicing and cost calculation are required for an award in section 3.3: External User Resource Reservation. Payment processing is not required for award, however Vendors that do not offer this functionality must be transparent that this is not an available feature.

2.14   **Question**: 3.4.36 Partial Upgrades – Is integration with IoT/BMS expected, or is manual entry acceptable?

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. Participants will have different needs related to track partial upgrades/replacements of resource elements at a location. Vendors should respond with the Solution's current capabilities.

2.15   **Question**: Current process: How are work orders managed today?

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. Participants manage work orders in a wide variety of ways.

2.16   **Question**: 3.5.4 Routing – Will routing taxonomies (paint/lock/grounds) be supplied by each district, or should vendors propose?

Answer: Criteria no. 3.5.4 asks Vendors to "Describe how the Solution supports differentiated routing of work orders by originating site and/or issue type (paint, lock, grounds, etc.)". Ed Tech JPA currently has 210 members who will not provide their routing taxonomies as part of this RFP process. Vendors should respond with the Solution's current capabilities.

2.17   **Question**: 3.5.8 Work Order Priority – What is the current process of assigning priority to work orders? Is this done by a supervisor or is the expectation to let the tool define priority automatically?

     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. Participants have different processes related to assigning priority work orders and staff involved. Vendors should respond with the Solution's current indications related to how priority of work order is indicated.

2.18   **Question**: 3.5.20 Parts Inventory – Is integration with procurement/ERP systems required?

     Answer: Integration with procurement/ERP systems is not required for award by Ed Tech JPA.

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. Participants have different needs related to integrations with procurement/ERP systems. Vendors should respond with the Solution's current parts inventory tracking and supply reporting available.

2.19   **Question**: 3.5.21 Site Chargebacks – How detailed should cost tracking be (labor only vs. labor+materials+overhead)?

     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. Participants have different needs related to how detailed cost tracking should be. Vendors should respond with the Solution's current capabilities related to site chargeback, including how granular the Solution can be.

2.20   **Question**: 3.5.24 Site Modifications – Do you expect construction-grade project management, or facilities-level only?

     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. Participants may have different planned uses for the Solution. Vendors should respond with the Solution's current capability related to supporting site modification requests and differentiate them from standard work orders.

2.21   **Question**: What is the estimated number of resources that are to be managed and tracked within the tool? What is the total number of users who are going to be accessing the tool? This should include day to day users in an agent/tech role who are responding to requests, managers/admins who need reporting visibility and can receive escalations, and any other persons who need authenticated system access.

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. Participants have different numbers of resources and users.

2.22   **Question**: The RFP notes that the award does not guarantee purchases — does Ed Tech JPA have any estimates of anticipated adoption or historical usage by members to help vendors model pricing?

        Answer: Ed Tech JPA awarded one vendor in response to its previous Facilities and Resource Management RFP in 2021. Two Ed Tech JPA members entered into Purchase Agreements with the awarded vendor. Ed Tech JPA Membership and contract utilization has grown significantly year over year, with some Vendor Partners having as many as 65 contracts resulting from Ed Tech JPA agreements.

2.23   **Question**: Requirement 1.1.11 (pg 127) requests a "link to website"—what website link are you referring to? For example, if we have an SOC 2 Type 1 certification, are you requesting the link to our auditor's website?

        Answer: Criteria no. 1.1.11 asks Vendors to "Describe any independently awarded certifications or credentials held by the Vendor or awarded to the proposed products. Examples of appropriate certifications include those awarded by manufacturers to installation/implementation partners, certifications related to data privacy or security (e.g., FedRAMP), and certifications related to research-supported educational outcomes (e.g., Digital Promise)". Vendors may provide a link to a website regarding their awards, or attach any desired documentation. This is not required, however it allows Vendors to share any information they feel will be helpful to Members when scoring proposals.

2.24   **Question**: Requirement 1.5.3 (pg 134) lists two items (A and B) for Vendors to respond to, but it has four items (A-D) listed in the response section. Please confirm that there isn't any additional information for us to respond to.

        Answer: Please disregard C and D in Criteria 1.5.3.

2.25   **Question**: Requirement 2.4.4 (pg 144-145) requests a list of all systems the proposed solution integrates with.
A. Is it acceptable to put this in the Annual Recurring Costs table as an "Other" option and provide a range instead of a set cost?
B. Also, we offer custom integration builds based on customer needs, requiring an SOW to be developed before determining the integration price. How does Ed Tech JPA suggest we list this in the Pricing Form?

        Answer: Criteria No. 2.4.4 asks for "a list of all work order systems, calendaring and email solutions, facilities planning/management systems, digital displays and signage, websites, video conferencing, financial and invoicing systems, and payment processors/credit card payment processors that Vendor's proposed Solution is currently integrated with. For each, please briefly describe the level

of integration and how frequently the Solution can pull/refresh data from these data sources. For systems that rely on data FROM the facilities and resource management system, specify any limitations on the number, frequency or scope of scheduled extracts that Participants can create and use ". Vendors should respond by providing lists of products the Solution has existing integrations with.

A. If there are associated costs to implement existing integrations Vendors should clearly state them in criteria 2.4.4 and the Pricing Form. Costs that are not set prices may be offered as hourly rates.

B. Custom integrations or development based on customer needs, requiring an SOW to be developed before determining the integration price should be included in Vendor's response to criteria no. 2.4.8.1 "Explain the process and tools available (ex: API) for Participants to integrate the Solution with other data systems". Typically Vendors include an hourly rate (or hourly rate schedule based on consultant role) in Pricing Form for custom integration and custom development. Vendors may, upon selection by a customer, develop an SOW for a set scope of work that uses that hourly rate as the basis for a fixed-cost engagement. SOWs would be included as an Exhibit to the Purchase Agreement.

Please be sure to include costs in the criteria response and the Pricing Form.

2.26   **Question**: Section 2.5.11 (pg 147-148) asks about AI features and whether participant/student data is used for training. Does Ed Tech JPA plan to evaluate AI capabilities as part of scoring, or is this for information only?

Answer: Criteria No. 2.5.11 asks "Confirm if Artificial Intelligence (AI) is used in the Solution". Criteria 2.5.11.1 and 2.5.11.2 address if Vendors use Participant data and/or student data to train the Solution/Large Language Model and if Participants can opt-out of.   The intent behind these questions is related to the use of Participant data and student data.

Ed Tech JPA will score Vendor's Products, including any AI features that are included.

2.27   **Question**: Appendix D: Pricing Form allows vendors to provide pricing for different tiers - please clarify if we can provide more than two tiers, and if there is a limit on the number of tiers that we can offer.

Answer: Vendors may add additional tiers to the Pricing Form. There is no limit to the number of tiers Vendors may add. Ed Tech JPA's goal is to allow Vendors to add Products with the pricing flexibility they need, and in a transparent, comparable format that is beneficial to members.