

Request for Information No. I
RFP No. 19/20-03 Educational Intelligence and Analytics Solution
September 30, 2019

Response to Proposers' Questions

1.1 Question: Vendor shall agree not to sell directly, or through a reseller, to Ed Tech JPA's Eligible Entities (regardless of whether the Eligible Entity is an Associate Member of the Ed Tech JPA), including all California public school districts, county offices of education, and community college districts, and any other public agency in California whose procurement rules, whether internal rules or rules enacted pursuant to statute, allow them to purchase goods or services through a procurement vehicle such as Ed Tech JPA, the Product(s) subject to the Master Agreement at a price lower than the price offered pursuant to the RFP and the Master Agreement.

- A) We already have clients that are current members of the JPA that we sell directly to.
- B) We have many many more that are not.

The way this reads is that I couldn't sell our solution outside of the agreement to anyone regardless of their participation with the JPA. So if I have a client that comes to me directly I would need to go through this.

Is this how you interpret this? What happens if they do not want to participate? I would also expect existing clients to be exempted from this, not just JPA participants.

Answer: While the JPA hopes that all awarded vendors will promote membership, it understands that vendors will enter into non-JPA agreements with Eligible Entities. The focus of this verbiage is the last phrase "...at a price lower than the price offered pursuant to the RFP and the Master Agreement." in reference to the minimum price guarantee. The minimum price guarantee is the expectation that Vendors provide the lowest available price to the Ed Tech JPA so there is not negotiation outside the JPA undercutting the pricing offered through the JPA.

The intent of the Minimum Price Guarantee is to secure competitive pricing for our members, while participating Vendors experience reduced costs of procurement and contract negotiations with individual local education agencies.

The Minimum Price Guarantee does not apply to contracts and partnerships that were in effect prior to the Master Agreement between Ed Tech JPA and Vendors.

Ed Tech JPA understands that unique marketing and licensing models may apply within the intelligence and analytics industry. Industry practices, including bundling licenses with other software platforms or devices, may make it difficult to standardize and compare costs.

With this consideration in mind, Ed Tech JPA will entertain Proposals wherein Vendors take exception to the Minimum Price Guarantee. Vendors who take exception to the Minimum Price Guarantee should specify their intent in Attachment 1, Section 5 "Exceptions", and should not complete the Minimum

Price Guarantee Acknowledgement in Appendix B. The Ed Tech JPA will consider reasonable alternatives to the Minimum Price Guarantee to ensure competitive pricing for our participating Members. Ed Tech JPA will make an award in the best interest of its members. Awards are contingent upon successful contract negotiations.

1.2 Question: We see that IUSD launched a project two years ago for a data warehouse. How has that project evolved and how is it working today?

Answer: IUSD selected DecisionEd as a result of IUSD RFP No. 15/16-0005IT Business Intelligence and Analytics Solution. IUSD and DecisionEd have built a strong partnership thus far. The project began as an admin dashboard with educational reports, and has now expanded to many reports and dashboards at the teacher, site, and district level. IUSD has additional predictive needs, and other JPA members are interested in building a data warehouse.

1.3 Question: The RFP addresses questions related to facilities. How would the educational intelligence solution relate to facilities?

Answer: We envision the use of educational intelligence and analytics solutions with regard to facilities to monitor facilities utilization such as classroom size, classroom requirements (different classes have different requirements such as an art class versus a computer class), facilities availability, tracking age of infrastructure, changes to facilities, and access to other spaces.

1.4 Question: Regarding page 101 and required references: are you looking for 5 references related to the specific product or just general educational clients?

Answer: The preference is to have five clients that are similar to JPA members (school districts or county offices of education) using the proposed product. The RFP specifies a minimum of three client who use the proposed products. We can also accept other government agencies, such as city or state agencies. The intent is for Vendors to show their ability to perform on a similar contract.

1.5 Question: Will you accept federal agencies as well?

Answer: Yes. Ed Tech JPA is looking for references that show that Vendors have the ability to perform on a similar contract. A federal reference is appropriate.

1.6 Question: How is Ed Tech JPA thinking about awarding to multiple vendors, and scoring awards?

Answer: Ed Tech JPA's Educational Intelligence and Analytics Solution 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 non-essential requirements are most important to them and use the information in Proposals to determine which Vendor best fits the needs of their organization.

1.7 Question: Did you gather additional requirements from member districts?

Answer: Yes, Prior to releasing the RFP Ed Tech JPA conducted a survey through CETPA and spoke with interested members to determine what criteria should be included.

1.8 Question: If a Vendor meets all essential requirements, but not other criteria, can they still bid?

Answer: Yes, Vendors who meet all essential requirements (green, double asterisks) and agree to terms and conditions will be considered for award. 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, all vendors must respond to essential requirements in Sections 3.1 and 3.2. Essential requirements for sections 3.3 - 3.9 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 - 3.6, but not for sections 3.7 - 3.9 they will be awarded for sections 3.1 - 3.6. Below is an example of a possible awards scenario.

Vendor	General/User Experience	Extract Transfer and Load	Data Model	Traditional Reporting	Business Intelligence	Advanced Analytics/Artificial Intelligence	Intervention Management	Other Required Modules	Other Available Components
Vendor A	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No
Vendor B	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Vendor C	Yes	Yes	Yes	No	No	No	No	No	No

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.

1.9 Question: Section 2.4.3 in the RFP mentions system integration. Are you expecting everything to be integrated?

Answer: JPA members have different needs and use different systems. Question 2.4.3 requests a list of all systems your Solution integrates with, this will better enable Ed Tech JPA members to determine which product best meets their needs. The listed systems are shown as an example and are currently in use with current JPA members, but we anticipate that more members will join the JPA in the near future, and they may use different systems.

1.10 Question: Page 101 requires references who use the proposed product. If only three references use the actual product, and 2 use a different solution is that ok?

Answer: Yes, if two references use a different solution offered by the Vendor that is fine.

1.11 Question: If we have more than one solution to offer, can we respond for both?

Answer: Yes. If a vendor has a base solution with add-ons it can submit a single proposal and note which requirements are met by the add-ons and which are met by the base solution. For example if a Vendor meets all criteria but the facilities module is an add-on for an additional cost, Vendor should submit one proposal and note in the criteria that there is an additional cost for the features listed. The Cost should be outlined in the Optional Services/Solutions and Costs Form in Appendix C.

If a Vendor has two separate distinct products it can submit two separate proposals. Each proposal will be evaluated separately.

1.12 Question: Regarding the minimum price guarantee referenced in the RFP: for districts that are not currently members, what is the relationship with this JPA and pricing? Are districts who are members expected to pay RFP prices without negotiation?

Answer: The intent of the minimum price guarantee is to secure competitive pricing for JPA members and to avoid deliberate undercutting of JPA pricing. JPA members are expected to pay prices listed on pricing forms in Appendix C. The JPA understands that exceptions may be required for extremely large customers or legacy customers; in those instances the JPA can discuss the need for an exception with vendors.

Additionally, tiered pricing is included in the RFP to allow vendors to adjust price based on the scale of contract to allow economies of scale to be incorporated into proposals. Ed Tech JPA understands that prices vary based on contract size, for example the price per student may be different

for a contract with 10,000 students vs the price for a contract with 200,000 students. Vendors can also include different levels of implementation in the one-time pricing form in Appendix C, if applicable.

1.13 Question: Can you have more than 2 tiers of pricing?

Answer: Yes. Vendors can expand the pricing form as needed. While vendors may add additional tiers and add information, we do require that vendors use the pricing form so it is easier for our members to compare pricing.

1.14 Question: We use our own pricing form, will that satisfy requirements?

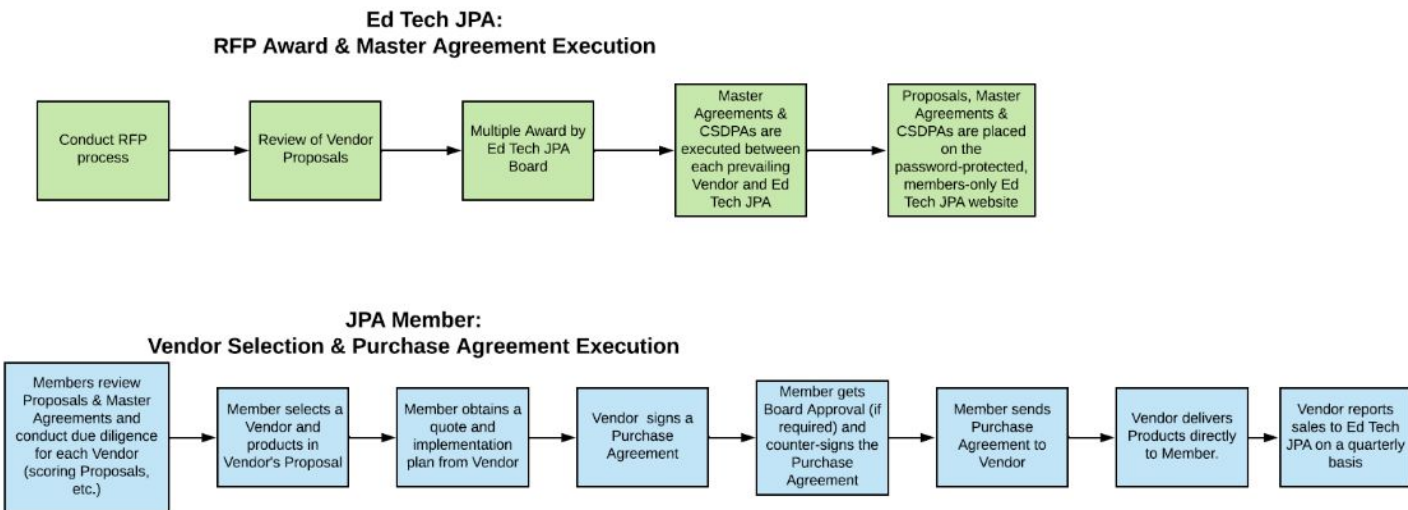
Answer: Vendors must complete the JPA pricing form, but can also include their own pricing forms to include additional clarification.

1.15 Question: Should everything be considered open market pricing with no relation to CMAS?

Answer: Yes. The JPA is unable to accept proposals that offer CMAS or NASPO terms/contracts. The JPA has its own set of required terms and conditions, including privacy requirements, and these typically contradict CMAS or NASPO terms. Typically our members are already authorized to utilize contracts directly from CMAS and NASPO.

1.16 Question: Do vendors enter into an agreement with the JPA or the school district?

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.



1.17 Question: Would governance of project implementation be directly by the entity?

Answer: Yes, the selection of vendor/product for a specific project, implementation, determination of fit for purpose, warranties, etc are directly between the vendor and member. Members will pay vendors directly. The RFP asks for a sample implementation timeline, but that is mainly so members can assess if solutions will meet their needs.

1.18 Question: Do we have details of data upon award?

Answer: After award by the JPA a Master Agreement and a California Student Data Privacy Agreement will be established between Ed Tech JPA and prevailing vendors. A Purchase Agreement will also be prepared so members can easily access it on the Ed Tech JPA website. The JPA will make Proposals, supporting documentation and contract documents available for members on the Ed Tech JPA website. Vendors are also welcome to advertise the JPA as a procurement vehicle. Members may select a vendor and will contact the vendor to begin planning and to determine an implementation specifics, and any necessary data migration.

1.19 Question: Is a data migration necessary?

Answer: Each JPA member has different needs. Some members may want to replace an existing data warehouse and require data migration, while others may have a data warehouse in place but require additional intelligence and analytics services to exist alongside their data warehouse system, and others may not have a data warehouse in place and not require data migration.

Vendors may address data migration costs in Appendix C to address different pricing options available to members who require this service. Data migration costs can be entered as a custom development hourly rate if this best meets the needs of vendors.

1.20 Question: Is there a chance for talking to members if multiple vendors are awarded and members want to see which will be the best fit?

Answer: Yes. Members will review proposals and supporting documentation of prevailing vendors and determine which is the best fit for their needs. Often after reviewing proposals members will narrow the selection to several finalists and work directly with the vendors to obtain additional information to select with solution will be the best fit for their needs. For example, Ed Tech JPA awarded to five vendors for RFP No. 18/19-05 Classroom Management and Student Online Safety Solution. IUSD reviewed all proposals and based on the scoring of proposals narrowed finalists to two vendors. IUSD then worked directly with vendors to move forward with pilots to determine which was a better fit for its needs. Members may determine which solution best meets their needs based on proposals or may want presentations and/or pilots.

1.21 Question: Will presentations be required for finalists ?

Answer: Vendors are selected for the Ed Tech JPA multiple award by scoring of proposals, and possible follow up phone calls and/or written clarifying questions To obtain additional information to determine if a vendor meets the essential requirements. There is typically not an on-site demonstration prior to the Ed Tech JPA award. Ed Tech JPA also does not predetermine how many vendors will be awarded.

Ed Tech JPA members may require onsite demonstrations prior to entering into a Purchase Agreement with vendors, but that will be worked out directly between members and vendors.

1.22 Question: Are LEAs required to leverage a JPA contract? Or can they go to the open market?

Answer: Ed Tech JPA members are free to contract with another vendor if awarded vendors do not meet their needs. However, if a JPA member does use a vendor who has been awarded for the product by Ed Tech JPA they are required to use the Ed Tech JPA Purchase Agreement. This does not apply to legacy customers.

1.23 Question: Can members release their own RFP?

Answer: Yes, however the majority of members either do not have the capacity to conduct the RFP process or prefer to focus their staff time elsewhere. Ed Tech JPA takes input from members prior to releasing RFPs in an effort to insure that RFPs meet the needs of members and to ease the procurement burden from members.

1.24 Question: Is this a sole source?

Answer: This is not a sole source as outlined in Public Contract Code section 3400, but this process does meet procurement requirements our outlined in Public Contract Code section 20118.2 and Government Code 6500 and 6502. JPA members can leverage awarded contracts as if they had run the RFP themselves.

1.25 Question: Who is IUSD using?

Answer: IUSD is currently using DecisionEd for its data warehouse.

1.26 Question: Will you be releasing the names of who attended the bidders conference?

Answer: Typically we don't, but we can release company names as a matter of public record. We will not release individual names and contact information. Below is a list of companies that RSVPd or contacted the designated contact after the RFP:

Aequitas Solutions, OtisEd, Alteryx, Hoonuit, Tandem Conglomerate, Brightbytes, Edupoint, Information Builders, CEDR a department of SJCOE, ESP Solutions Group, Inc., Edsby, Intellctyx, Schoolzilla, SAS, AWS, Data Strong, DLZP Group, Innive, Inc.

Please keep in mind that the site modules vary, and each company may be planning to respond to different sections of the RFP.

1.27 Question: We would like to see the list of participants that was requested during the meeting. Will that be included in the Q&A documentation?

Answer: Please see question 1.26.

1.28 Question: Is there an interest in this RFP from an existing JPA Member?

Answer: Capistrano Unified School District (ada approximately 53,000) has expressed an interest in purchasing an Ed Tech JPA awarded vendor. In addition, we expect there to be high interest in this RFP from associate members soon after it closes.