

Education Technology Joint Powers Authority



RFP No. 21/22-02

**Human Resources and Substitute Management
Systems**

PROPOSAL DEADLINE: December 3, 2021, 12:00_{pm}

**Contact: Michelle Bennett, Purchasing Dept.
Education Technology JPA
5050 Barranca Parkway, Irvine, California 92604
Telephone: (949) 936-5022 Fax (949) 936-5219
Email: edtechjpa@iusd.org**

All dates subject to change at the sole discretion of Ed Tech JPA. Please continue to check our website throughout the proposal and selection periods for updates.

<https://edtechjpa.iusd.org/procurement/open-procurements>



NOTICE CALLING FOR PROPOSALS

AGENCY: Education Technology JPA
PROPOSAL DEADLINE: December 3, 2021 at 12:00 pm
PLACE OF RECEIPT: Education Technology JPA
%: Irvine Unified School District
Purchasing Department
Attn: Michelle Bennett
5050 Barranca Parkway
Irvine, California 92604-4652

NOTICE IS HEREBY GIVEN that the Education Technology JPA, acting by and through its Governing Board, hereinafter referred to as "Ed Tech JPA" will receive up to, but no later than, the above stated Proposal Submission Deadline, sealed Proposals at the place identified above for its upcoming RFP No. 20/21-02 Human Resources and Substitute Management Systems.

Request for Proposal documents can be downloaded at:
<https://edtechjpa.iusd.org/procurement/open-procurements> .

Time is of the essence. The Ed Tech JPA reserves the right to reject any and all submissions, to negotiate with any or all responsible Proposers, and to waive any deficiencies, irregularities or informalities in any proposal or during the evaluation process. The award of a Master Contract(s), if made by the Ed Tech JPA, will be by action of the Governing Board.

Pre-Proposal Vendor Conference: The Ed Tech JPA will conduct a non-mandatory pre-proposal vendor conference on November 1, 2021 at 11:00am pacific time at <https://iusd.zoom.us/j/89314853891?pwd=SlhSSGZVNkdDcCt1NFRsTVpGUkNOZz09> Zoom Meeting ID: 893 1485 3891 Passcode: EEE6jh. Vendors who wish to attend this meeting should RSVP to edtechjpa@iusd.org.

Any questions regarding the Request for Proposals shall be directed to edtechjpa@iusd.org, via e-mail only by 12:00 pm on November 16, 2021. All responses will be posted on the Ed Tech JPA's website.

Education Technology JPA
Governing Board

Publish: October 22 & 29, 2021

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1.0 Background and Overview

1.1 Overview

The Ed Tech JPA, a California Joint Powers Authority (Ed Tech JPA), invites qualified, experienced vendors (Vendors) to submit responsive proposals (Responses, Proposals, or Proposal Forms) in compliance with the specifications contained in this Request for Proposals (RFP). This RFP is for human resources and substitute management systems, although ancillary services may be included in the provision of these items. Installation services may be requested via this RFP. Selection for award(s), if any, will go to the Vendor(s) who submit Responses that Ed Tech JPA determines to be most advantageous to Ed Tech JPA and the entities it represents. **Products offered by the Vendor(s) selected for the award of a Master Agreement will be available for purchase by all California public agencies and public agencies outside of California who have verified that they are eligible to participate.**

In addition to reviewing proposals for Ed Tech JPA, the initiating agency, Irvine Unified School District, has a need for the product. The initiating district will review proposals to determine a Vendor best suited to provide the product for its own needs and anticipates entering into a Purchase Agreement for the product following execution of the Master Agreement awarded pursuant to this RFP.

1.2 Joint Powers Authorities

Pursuant to the California Joint Exercise of Powers Act, a JPA may be created in California when two or more local government entities enter into an agreement to exercise jointly any power common to the contracting parties. JPAs are frequently used to aggregate expertise and purchasing power for procurement, as in the case of insurance or utilities services. JPAs can be given any of the powers inherent in the participating members, as specified in a joint powers agreement.

1.3 Ed Tech JPA

Ed Tech JPA is a JPA duly formed and existing under the California Joint Exercise of Powers Act. Ed Tech JPA was formed to aggregate purchasing power and expertise for public agencies. While Ed Tech JPA's focus is primarily California K-12 public schools, our membership has grown to include colleges and government agencies outside of California. This RFP is issued on behalf of Ed Tech JPA's membership. A list of current Ed Tech JPA members is available on the JPA's website: <https://edtechjpa.iusd.org/about/our-ed-tech-jpa-members> .

1.4 Requested Services

This solicitation is intended to provide a mechanism for Ed Tech JPA members to procure new or upgraded software and services to support human resources and substitute management systems. Ed Tech JPA members seek state-of-the-art human resources and substitute



management systems (hereinafter referred to as “Product” or “Solution”) to meet the needs of varied facilities and programs, in a variety of environments. Ed Tech JPA is soliciting qualified service vendors, (hereinafter referred to as “Vendor”, “Contractor” or “Provider”) for a variety of solutions to meet its membership needs. Vendor shall submit a proposal for the purchase, implementation and ongoing services for a human resources and substitute management system.

1.5 Eligible Entities and Participants

The pricing, terms, and conditions of any award pursuant to this RFP will be made available to current Ed Tech JPA members and to other “Eligible Entities” who elect to join the Ed Tech JPA. For purposes of this RFP, Eligible Entities are: (a) all California public school districts, county offices of education, and community college districts, and (b) any other public agency in the United States 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.

For purposes of this RFP, a “Participant” is an Eligible Entity who chooses to purchase items through this RFP. Eligible Entities must first become Associate Members of the JPA by entering into an Associate Member Agreement, and thereafter may elect to become Participants of a Master Agreement by entering into a Purchase Agreement with a vendor. Founding Members of Ed Tech JPA may be a Participant without entering into an Associate Member Agreement.

Notwithstanding the purchase anticipated by the initiating district stated above, an award issued pursuant to this RFP does not represent an obligation by Ed Tech JPA, or by any Eligible Entity, to purchase items. Although a Master Agreement awarded under this RFP does not guarantee a particular level of sales as a result of that Master Agreement, Ed Tech JPA’s mission to meet the procurement needs of our program Participants indicates that a Vendor who is committed to this program will achieve success in its sales efforts.

1.6 Master Agreement

Pursuant to Public Contracts Code 20118.2 and Government Code 6500 and 6502, Ed Tech JPA (on behalf of membership) is issuing this RFP for the Product. Ed Tech JPA will evaluate proposals and all vendors that meet minimum criteria/score will enter into a Master Agreement with Ed Tech JPA, setting forth the general terms for purchase of the Solution. A sample Master Agreement is attached in Appendix A.

After a Master Agreement has been established, the Vendor’s proposed product and services will be listed on the Ed Tech JPA website. Ed Tech JPA will also include procurement instructions and contract documentation for Founding Members and Associate Members on its website. Details of the procurement process and administrative fee payment will be provided to Vendor finalists upon award. All participating Vendors must comply with Ed Tech JPA’s ordering



process to ensure compatibility with all legal and regulatory requirements, Ed Tech JPA member needs, and Vendor's practices.

Each Participant is responsible for (a) completing their own due diligence regarding the suitability of Vendor, including using price as a significant factor, (b) prior to executing a Purchase Agreement, Associate Members/Founding Members will work with Vendor to establish an Implementation Plan with the Participant, as further described in Section 2.2.

Awarded Vendors will also negotiate a Purchase Agreement to be executed when a Participant elects to purchase the Solution. Prior to executing a Purchase Agreement with a Participant, Vendor will establish an implementation timeline and implementation plan specific to the Participant's needs, as further described in Section 2. An Eligible Entity is not bound to a purchase until it has obtained any necessary approval from its Board and executed a Purchase Agreement with the Vendor for the Solution.

Vendors must report to Ed Tech JPA any income directly or indirectly resulting from the sale of products included in the Master Agreement to Participants, for purchases made using Ed Tech JPA agreements and/or relying on this RFP excluding renewals of pre-existing contracts. Reports must be submitted for the Quarters and within the timeline outlined in section 1.14 of this RFP and in section 15.B. of the sample Master Agreement attached hereto as Appendix A. Vendors must remit a copy of all Purchase Agreements, including renewals and amendments, to Ed Tech JPA within 30 days of request by Ed Tech JPA. Vendors participating in this RFP agree to a standing audit by the Ed Tech JPA for all products included in the Master Agreement.

1.7 Period of Performance

The term of the Master Agreement resulting from this RFP shall be five (5) years. Purchase Agreements entered into by Participants and Vendor shall be subject to a maximum contract length of 5 years, or may be shorter, as the parties elect. The Master Agreement may be terminated by Ed Tech JPA for convenience after three years by the giving of notice of at least thirty (30) days before the expiration of the (3) year term.

The parties understand that Participants ordering Products pursuant to the Master Agreement may extend for multiple years after the Term of the Master Agreement. The expiration or termination of the Master Agreement shall not affect Vendor's obligation to deliver Products ordered by Participants before the expiration of the Master Agreement.

1.8 Reservation of Rights

Ed Tech JPA reserves the right to award all, none, or select portions of this RFP to one or multiple vendors. Ed Tech JPA reserves the right to negotiate terms and conditions of the RFP as necessary, to reject any or all proposals, to increase quantities, and to waive any irregularities or informalities in the RFP or in this process.

Ed Tech JPA reserves the right to modify the RFP documents, or any portion thereof, by the issuance of written addenda posted on the Ed Tech JPA website. In the event Ed Tech JPA shall modify any portion of the RFP documents pursuant to the foregoing, the proposal submitted by any Vendor shall be deemed to include any and all modifications reflected in any addenda issued.

Ed Tech JPA reserves the right to conduct a background inquiry of the selected Vendor(s) which may include collection of contractual and business associations and practices, employment histories and reputation in the business community. By submitting a proposal, Vendor consents to such an inquiry and agrees to make available such books and records deemed necessary to conduct the inquiry.

Ed Tech JPA reserves the right to award multiple Master Agreements for each classification of Products listed in this RFP as deemed to be in the best interest of Ed Tech JPA and its Members and has determined that awards to more than one Vendor for comparable goods and services at various prices may best meet the needs of Participants.

Ed Tech JPA shall have the right to negotiate any and all of the final terms and conditions of any agreement with Vendor and nothing in this RFP or any Response shall be deemed or construed as a limitation of such rights.

This RFP is solely a solicitation for Proposals. Neither this RFP, nor any response to this RFP shall be deemed or construed to: (i) create any contractual relationship between Ed Tech JPA and any Vendor; (ii) create any obligation for Ed Tech JPA or its Members to enter into a contract with any vendor or other party; or (iii) serve as the basis for a claim for reimbursement for costs associated with submittal of any Proposal.

PROVISIONS REQUIRED BY LAW: Vendor acknowledges that it has conducted and performed the required research to become aware and knowledgeable of all federal, state and local laws/statutes that are referenced herein, may pertain to and/or govern the procurement activities and transactions covered by this RFP. These provisions of law and any clause required by law that is associated with and relates to this RFP and any resulting contract will be read and enforced as though it were included herein.

1.9 Data Privacy Compliance

Vendors' products and services must be fully compliant with all applicable requirements including all state and federal laws. Vendors will be required to execute the most recent version of the Standard Student Data Privacy Agreement CA-NDPA (CA-NDPA). A copy of the CA-NDPA is attached hereto in Appendix E.

1.10 Indemnification

Vendor will indemnify, defend and hold harmless Ed Tech JPA, its agents, employees and assigns, including independent contractors, and any Participant contracting with Vendor (Indemnified Parties) from any and all claims, demands, suits, proceedings, loss, cost and damages of every kind and description, including any attorney’s fees and/or litigation expenses, which might be brought or made against or incurred by Indemnified Parties on account of loss or damage to any property or for injuries to or death of any person, caused by, arising out of, or contributed to, in whole or in part, by reasons of any act, omission, professional error, fault, mistake, or negligence of Vendor, its employees, agents, representatives, or subcontractors, their employees, agents, or representatives in connection with or incident to this RFP, or arising out of worker’s compensation claims, unemployment compensation claims, or unemployment disability compensation claims of employees of the Vendor, and/or its subcontractors or claims under similar such laws or obligations. Vendor’s obligation under this section will not extend to any liability caused by the sole negligence of Indemnified Parties.

1.11 Special Note on Vendor Pricing

Pricing proposed on a sliding scale, “menu” format, or varying by tiers is highly recommended and encouraged to provide Participants with purchasing options.

1.12 Ed Tech JPA Administrative Fee

Vendor agrees to pay Ed Tech JPA an administrative fee (the “Administrative Fee”) calculated as four percent (4%) of the gross invoiced amount of any Purchase Agreement with Vendor based on an award under the RFP and all revenue derived directly from any Purchase Agreement, including any Additional Services, or agreement extensions or renewals. Vendors whose gross sales exceed two million dollars (\$2,000,000.00) each fiscal year may receive a discount and pay Administrative Fees as follows:

Sales Amount*	Administrative Fee**
\$2,000,000.00 - \$3,999,999.99	3.5%
\$4,000,000.00 and above	3%

*The fiscal year term is July 1 - June 30.

**Sales are the annual gross amount invoiced of any Participant Agreement with Vendor based on an award under the RFP and all revenue derived directly from any Participant Agreement, including any Additional Services, or agreement extensions or renewals.

***Any discounted Administrative Fee shall be applied to Sales in the quarter after the minimum threshold has been met. Discounted Administrative Fees shall revert to four percent (4%) after the minimum threshold is no longer met.

Computations of the Administrative Fee shall exclude state, local, or federal taxes levied on invoiced amounts. The Administrative Fee must be included when determining the pricing

offered. The Administrative Fee is not negotiable and shall not be added as a separate line item on invoices. The Administrative Fee is not refundable to Participants or Vendors under any circumstances. In the event Ed Tech JPA's operating costs increase, the Administrative Fee is subject to increase to offset such increased costs. Vendors will be permitted to adjust Product pricing in direct proportion to such increase, as further explained in the Master Agreement. Vendors are not responsible for paying an Administrative Fee for purchases made by existing customers that do not use the Ed Tech JPA contract in any manner and whose contracts do not rely on any competitive procurement performed by Ed Tech JPA.

1.13 Minimum Price Guarantee

To prevent underpricing and protect seller margin, Vendor's pricing shall be subject to a Minimum Price Guarantee (MPG), whereby, Vendor shall agree not to sell directly, or through a reseller, the Product(s) subject to the Master Agreement at a price lower than the price offered pursuant to the RFP and the Master Agreement to Ed Tech JPA's Eligible Entities located in California (regardless of whether the Eligible Entity is a Member of the Ed Tech JPA).

During the period of delivery under a contract resulting from this RFP, if the price of an item decreases, Ed Tech JPA Participants shall receive a corresponding decrease in prices on the balance of the deliveries for as long as the lower prices are in effect. Vendor agrees to amend the Master Agreement to reflect the decreased pricing. Ed Tech JPA Participants shall be given the benefit of any lower prices which may, for comparable quality and delivery, be given by the Vendor to any other school district or any other state, county, municipal or local government agency in a California county for the product(s) listed in the RFP. At no time shall the prices charged to Ed Tech JPA Participants exceed the prices under which the RFP was awarded.

1.14 Usage Reporting Requirement

Upon contract award pursuant to this RFP, all Vendors will be required to provide quarterly usage reports to Ed Tech JPA or designee. The initiation and submission of the quarterly reports are the responsibility of the Vendor. Ed Tech JPA is not required to provide prompting or notification. Vendor is responsible to collect and report all sales data including resellers and partners sales associated with the Master Agreement. Quarterly reports must coincide with the quarters in the fiscal year as outlined below:

Reporting Period	Due Date
January 1 - March 31	April 30
April 1 - June 30	July 31
July 1 - September 30	October 31
October 1 - December 31	January 31

Vendors must identify the person responsible for providing the mandatory usage reports. This contact information must be kept current during the Master Agreement period. Ed Tech JPA must be notified if the contact information changes.

The purpose of the Master Agreement usage-reporting requirement is to aid in Master Agreement management. The specific report content, scope, and formal requirements will be provided to the awarded Vendors during Master Agreement execution. Failure to comply with this requirement may result in Master Agreement cancellation.

2.0 Purchase Agreements, Payments & Order Fulfillment

2.1 Purchase Agreements

Upon contract award pursuant to this RFP, Vendors will work with Ed Tech JPA to prepare Purchase Agreement templates for all products available through the Master Agreement. Ed Tech JPA will make the completed Purchase Agreement template available for Associate Members and Founding Members. Sample Agreements are included in Appendix A.

2.2 Ordering Process

It is Ed Tech JPA's intent to make the procurement of products and services as easy as possible. The following outlines the process by which Participants may utilize Ed Tech JPA:

2.2.1 The Ed Tech JPA website includes each Vendor's contact information listed in Vendor's Proposal and links to Vendor's Proposal, Pricing Forms, Clarifying Questions, Master Agreement, Standard Student Data Privacy Agreement (CA-NDPA), and Purchase Agreement template.

2.2.2 Associate Members and Founding Members may browse products, review RFP Proposals on the Ed Tech JPA's website and conduct their own due diligence, using price as a significant factor, to determine which product best meets their unique needs. JPA Members may approach Vendors directly to request services. If a Member contacts Vendor directly, Vendor must provide a copy of the Purchase Agreement and refer Member to Ed Tech JPA's website.

2.2.3 The Participant shall have the opportunity to work with Vendor to determine the suitability of the product, and will provide Vendor with information regarding the Participant's existing software and hardware environment, the number of employees/users anticipated to use the Product and any other information necessary to establish an implementation plan. To enable the Participant to make a timely determination as to suitability, within fourteen (14) days of Participant's contact with Vendor, the selected Vendor shall provide the Participant with a project plan that details

the proposed implementation approach and timeline for the product (“Implementation Plan”). The Implementation Plan shall, at a minimum, include infrastructure and data integration, testing, content creation, training and post-implementation support and project evaluation.

2.2.4 If the Participant elects to confirm the purchase, it shall execute the Purchase Agreement including any required exhibits, issue a Purchase Order to Vendor, and submit payment to Vendor in accordance with Participant practices. The Purchase Agreement may require approval from the Participant’s governing board.

2.2.5 Vendor shall provide a copy of the executed Purchase Agreement to Ed Tech JPA upon Ed Tech JPA’s request.

2.2.6 Once an executed Purchase Agreement is processed, Participant will work directly with Vendor for order fulfillment. Vendor will deliver products and services directly to the Participant in accordance with the implementation plan.

2.3 Purchase Agreement Implementation Process

Vendor will be required to provide Participants with the Solution(s) following Purchase Agreement execution and issuance of a Purchase Order, as agreed by both Vendor and Participant. Participants will work directly with Vendor to receive the Solution.

2.3.1 Project Timeline

Vendor shall deliver the Product to Participant according to the implementation plan identified by the parties pursuant to Section 2.2 above.

2.3.2 Site Access and Work Hours

If Vendor requires access to any school site, access to each site will be coordinated through the Participant project representative a minimum of five (5) work days in advance. Site access schedule and work plan must be submitted and approved by Participant prior to the Vendor arriving onsite.

2.3.3 DOJ Clearance

All Vendor personnel working on any Participant site shall have attained the proper Department of Justice (DOJ) clearance as required by applicable laws and the Participant policy. Vendor must comply with this requirement and, upon request from Participant, must demonstrate this clearance for all personnel prior to being allowed onsite. Those who are not cleared may not be allowed on the project.

2.3.4 Interpretation of Plans and Documents

The interpretation of the plans, specifications, forms, and all project documentation shall be determined by Participant. It is Vendor’s responsibility to verify existing conditions and



assumptions. Vendor must verify all such information prior to executing a Purchase Agreement with Participant and issuance of a Purchase Order.

2.4. Subscription-based Licensing, Bundling, Additional Services

Purchases made pursuant to this RFP may include subscription-based licensing, product bundling, and training, maintenance and other additional services (“Additional Services”) as determined between the Vendor and Participants. The cost of Additional Services not reflected in the product purchase price found in Appendix C. Pricing Form shall also be subject to the Administrative Fee assessed by Ed Tech JPA.

3.0 Instructions to Vendors

3.1 Proposal Contact and Correspondence

All correspondence related to the RFP must be directed to the following designated Ed Tech JPA RFP contact:

edtechjpa@iusd.org
Michelle Bennett, Purchasing Department
Irvine Unified School District
5050 Barranca Parkway
Irvine, CA 92604

There will be no verbal understandings recognized by the Ed Tech JPA.

No Vendor should attempt to contact or obtain information regarding this RFP from any other Ed Tech JPA representative.

All official records will be posted on the Ed Tech JPA website:

<https://edtechjpa.iusd.org/procurement/open-procurements>

or sent in writing by the official contact listed on the RFP or Amendments. It is the Vendor’s responsibility to monitor the website for changes, updates, revisions and/or uploaded documents.

3.2 Proposal Deadline and Submission

Proposals must be received no later than 12:00 pm PST on December 3, 2021.

Vendor to submit:

- (1) Master Bound Hardcopy Proposal in a binder that allows for easy removal of pages.
- (1) Additional Bound Hardcopy Proposal in a binder that allows for easy removal of pages.



(1) Electronic Proposal on CD or Flashdrive

Proposals shall be submitted in a sealed box/envelope and shall be clearly marked: “Response to RFP 21/22-02 Human Resources and Substitute Management Systems.”

Proposals shall be submitted to:

Ed Tech JPA
 % Irvine Unified School District
 Purchasing Department
 Attn: Michelle Bennett
 5050 Barranca Parkway
 Irvine, California 92604

3.3 Delivery to Ed Tech JPA

Proposals may be delivered between the hours of 9:00am and 4:00pm on weekdays, excluding holidays. Written Proposals must be received at the Ed Tech JPA Procurement Office no later than the Proposal Submission Deadline specified in the Calendar of Events. No telegraphic, facsimile, or emailed Proposal will be accepted. The Ed Tech JPA assumes no responsibility for late delivery.

If discrepancies between two (2) or more copies of the Proposal are found, the Proposal may be rejected. If, however, the Proposal is not rejected, the master copy will provide the basis for resolving such discrepancies.

3.4 Withdrawal, Resubmission or Modification

A Vendor may withdraw the Proposal at any time prior to the Proposal Submission Deadline specified in the Calendar of Events, by submitting a written request for its withdrawal to the designated Ed Tech JPA RFP contact, signed by the Vendor or authorized agent. The Vendor may thereafter submit a new or modified Proposal prior to the Proposal Submission Deadline. Modification offered in any other manner, oral or written, will not be considered. A Proposal cannot be changed, corrected, or withdrawn after the Proposal Submission Deadline.

3.5 Calendar of Events

Event	Details	Date
Advertisements - RFP Posting	OC Register	October 22 & 29, 2021
Pre-Proposal Vendor Conference (Non Mandatory)	https://iusd.zoom.us/j/89314853891?pwd=SlhSSGZVNkdDcCt1NFRsTVpGUkNOZz09	November 1, 2021 12:00pm

	<p>Meeting ID: 893 1485 3891 Passcode: EEE6jh One tap mobile +16699006833,,89314853891#,,,,*812899# US (San Jose) +14086380968,,89314853891#,,,,*812899# US (San Jose)</p> <p>Dial by your location +1 669 900 6833 US (San Jose) +1 408 638 0968 US (San Jose) +1 346 248 7799 US (Houston) +1 253 215 8782 US (Tacoma) +1 312 626 6799 US (Chicago) +1 646 876 9923 US (New York) +1 301 715 8592 US (Washington DC)</p> <p>Meeting ID: 893 1485 3891 Passcode: 812899</p> <p>Find your local number: https://iusd.zoom.us/j/89314853891</p>	
Last Day to Submit Questions (RFIs)	edtechjpa@iusd.org	November 16, 2021
Response to Questions Posted	Ed Tech JPA website	November 23, 2021
Proposals Due	5050 Barranca Pkwy. Attn: Michelle Bennett Irvine, CA 92604	December 3, 2021 12:00pm
Evaluation and Selection of Finalists		December 3, 2021 - January 13, 2022
ED TECH JPA Board Action		January 27, 2022 *anticipated

All dates are subject to change. Amendments to these dates, and other aspects of the RFP, will be posted at <https://edtechjpa.iusd.org/procurement/open-procurements> .

3.6 Preparation

A Proposal should be prepared in such a way as to provide a straightforward description of Vendor capabilities to satisfy the requirements of this RFP. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, and completeness and clarity of content.

The completed documents(s) should be without interlineations, alterations, or erasures. The Proposal should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely. It is more desirable to give additional information than less when the answer could be misinterpreted.

Proposals must follow Ed Tech JPA's prescribed format, including all required forms and response templates. Vendors must include all documents and forms indicated in the Proposal Submission Checklist provided in Appendix B. Write out all answers using the Proposal Form template provided. Additional material may be submitted with the proposal as appendices. No brochures or marketing materials will be considered when scoring Proposals. Cross-references to the Proposal Form in additional materials will not be considered responsive. Any additional descriptive material that is used in support of any information in Vendor's proposal must be clearly identified.

The contents of Vendor's proposal, including technical specifications for hardware and software and software maintenance fees, shall remain valid for a minimum of one hundred and sixty (160) days after the proposal due date. If selected, Vendor's Proposal pricing shall remain valid for the duration of the contract term including the original contract and all extensions. If Vendor's Proposal includes functionality from a different platform than the human resources and substitute management system the platform offering the functionality shall be clearly identified and all additional costs must be outlined clearly and included in the Optional Costs section of the Pricing Form in Appendix C. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.

The person signing verifies that he/she is authorized to submit the proposal and bind Vendor to provide the products/services listed in the RFP, Proposal and any resulting Master Agreement and Purchase Agreement(s).

3.7 False and Misleading Statements

A Proposal which contains false or misleading statements, or which provides references which do not support an attribute or condition contended by Vendor, may be rejected if, in the opinion of Ed Tech JPA, such information was intended to mislead Ed Tech JPA in its evaluation of the Proposal, and the attribute, which is a condition or capability of a requirement of this RFP.

3.8 Request for Information (RFI)

Vendors are encouraged to ask questions during the open RFP period. All questions shall be in

writing and submitted to the listed Ed Tech JPA contact person. Questions must be received by the deadline specified in the Calendar of Events. There shall be no verbal understandings or clarifications recognized by the Ed Tech JPA. All responses shall be in writing by an authorized Ed Tech JPA employee or their designated representative. Responses to all RFIs received will be posted on the Ed Tech JPA Website. It is Vendor's responsibility to monitor the Ed Tech JPA website for RFI Responses, RFP Amendments, changes, updates, revisions and/or uploaded documents.

3.9 Amendments to the RFP

During the RFP period, the Ed Tech JPA may amend the RFP. Amendments to the RFP and/or calendar of events will be posted at

<https://edtechjpa.iusd.org/procurement/current-procurements> .

3.10 Limits of the RFP

Ed Tech JPA reserves the right to reject all proposals and will determine what future action, if any, will be taken. All costs incurred in the preparation or submission of a proposal shall be entirely the responsibility of the Vendor and shall not be chargeable directly or indirectly to the Ed Tech JPA, its Members, or Eligible Entities.

3.11 Public Records Act

All records, documents, drawings, plans, specifications and other materials submitted by Vendor in its proposal, during the procurement process, and during the course of any work awarded shall become the exclusive property of Ed Tech JPA and may be **deemed public records** and subject to the provisions of the California Public Records Act (Government Code, sections 6250 et seq.). Ed Tech JPA's use and disclosure of its records are governed by this Act. Ed Tech JPA will accept information clearly labeled "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" as determined by the submitting party in accordance with the Act. Ed Tech JPA will endeavor to inform Vendor of any request for the disclosure of such information. Under no circumstances, however, will Ed Tech JPA be responsible or liable to Vendor or any other party for the disclosure of any such labeled information. Vendors that indiscriminately identify all or most of their proposal as exempt from disclosure without justification may, at Ed Tech JPA's discretion, be deemed non-responsive; and such information shall be deemed public records. Ed Tech JPA will not advise as to the nature or content of documents entitled to protection from disclosure under the California Public Records Act, including interpretations of the Act or the definitions of "Trade Secret," "Confidential" or "Proprietary", however pricing documents are not considered proprietary. If litigation is brought under the Public Records Act concerning documents submitted in response to this RFP, the appropriate Vendor shall indemnify, defend and hold harmless Ed Tech JPA in such litigation. Ed Tech JPA reserves the right to withhold information for review by competitors until after it has completed its evaluation. Information marked as "Trade Secret," "Confidential" or "Proprietary" will be available to Ed Tech JPA Members through a member's-only webpage unless Vendor indicates that such information should not be available to Ed Tech JPA Members who are considering purchasing Product.

4.0 Evaluation and Award

4.1 General Information

Award will be made to the Vendor(s) offering an advantageous proposal for the human resources and substitute management system and related services. Ed Tech JPA shall not be obligated to accept the lowest priced proposal(s), but will make an award(s) in the best interest of its Members after all factors have been evaluated. Ed Tech JPA may make awards to multiple vendors. All proposals received in response to this RFP will receive a fair and impartial evaluation by the Ed Tech JPA. In conducting this evaluation, Ed Tech JPA and Members may obtain and use information, in addition to that contained in the proposals, from any source desired. Customers on each Vendor's reference list may be contacted, as may other customers selected by the Ed Tech JPA and listed by Vendor as a reference.

Ed Tech JPA shall make its evaluation in its sole discretion and its decision to award a Master Agreement(s) shall be final. Thereafter, Members electing to purchase Product pursuant to an awarded Master Agreement shall use their discretion in evaluating and selecting Product. The Public Contracts Code section 20118.2 shall guide both the Ed Tech JPA's evaluation of proposals and Master Agreement negotiations, as well as Eligible Entities' selection of vendor, and Purchase Agreement negotiations associated with this Request for Proposals. Vendors submitting Proposals must be located in either the United States or in a country where the General Data Protection Regulation (GDPR) governs and must perform the proposed Solution in either the United States or in a country where the General Data Protection Regulation (GDPR) governs. Vendors outside of the United States must agree to the Standard Student Data Privacy Agreement CA-NDPA with no redlines/amendments. Vendors should note that some Ed Tech JPA members may have board policies and procedures that limit their ability to contract with agencies outside the United States.

Awards shall be made contingent upon successful contract negotiations as determined by Ed Tech JPA's sole discretion. Even after award Ed Tech JPA may or may not proceed in establishing contracts. Execution of contracts is solely at the discretion of Ed Tech JPA. In the event that Ed Tech JPA elects not to establish a contract with a previously awarded vendor Ed Tech JPA's governing board shall vote to revoke the award and the vendor shall be notified.

4.2 Requirements

Vendors must meet all of the essential requirements defined in this RFP, including compliance with performance, licensing requirements, ability to deliver specified services, conformance to the terms and conditions of this RFP, meeting mandatory system requirements, performance expectations, contract requirements and general terms. Vendors that do not meet the minimum requirements may be disqualified. All essential requirements in Attachment 1 shall be denoted with two asterisks (**).

4.2.1 Permits and Licenses

Vendor and all of the Vendor's employees or agents shall secure and maintain in force such licenses and permits as are required by law, in connection with the furnishing of materials, articles, or services listed herein. All operations and materials shall be in accordance with all applicable Federal, State, County and City requirements.

4.2.2 Delivery and Installation Requirements

All items shall be F.O.B. Destination to delivery locations specified in the Site Delivery List. Delivery charges, fuel surcharges or any additional costs associated with delivery will not be accepted or paid by Ed Tech JPA or Participants. Actual delivery of products shall be coordinated with Participants. Pallets and boxes must be broken down and disposed of by Vendor.

4.2.3 Fingerprinting

If applicable, all contractors, including subcontractors shall be required to comply with the provisions of Education Code 45125.1 and 45125.2 and Participant Board policies to ensure that no Vendor employees or employees of subcontractors who may come in contact with Participant pupils in the performance of their duties have been convicted of a violent or serious felony as defined in the California Penal Code Section 677.5(c) and 1192.7(c). During the term of the Agreement, the Vendor, including subcontractors, shall comply with the provisions of Education Code Section 45125.1, including fingerprinting when Participant determines that the Vendor's employees or employees of subcontractor will have more than limited contact with Participant pupils. If the Vendor, or its subcontractors, fails or refuses to comply with this provision, such failure or refusal shall be considered sufficient cause for disqualification from further award considerations. If such failure or refusal to comply occurs after the Purchase Agreement is executed, Participant may terminate the Agreement, in whole or in part, with no penalty.

4.3 Scoring, Interviews & Vendor Presentations

Qualifying Vendors will be evaluated on their complete proposal, based on the following considerations:

Vendor Support and Ability to Perform
Technology Requirements
Functionality and Usability
Price

Vendors must meet all essential requirements to be awarded a Master Agreement pursuant to this RFP. Essential requirements are denoted with two asterisks ().**

Ed Tech JPA reserves the right to 1) conduct in-person interviews and/or require a formal

presentation for all or a portion of the responding Vendors, 2) visit one (1) or more of the Vendor's current customer sites, and conduct discussions with responsible representatives who submit proposals determined to be reasonably susceptible of being selected for an award. Discussions may be for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. Prior to award, Vendors may be asked to submit best and final offers. Vendors shall be given fair and equal treatment with respect to any opportunity for discussion and written revision of proposals. In conducting discussions, Ed Tech JPA will not disclose information derived from proposals submitted by competing firms.

Participants reserve the right to 1) conduct in-person interviews and/or require a formal presentation 2) visit one (1) or more current customer sites, and conduct discussions with all or a portion of the Vendors with a current Master Agreement in place with Ed Tech JPA.

4.4 Contract and Warranties

Following the Award of the Master Agreement pursuant to this RFP, Participants may enter into a Purchase Agreement with a selected Vendor to deliver the proposed Products and services. The resulting agreement shall conform to the terms and conditions set forth in this RFP and Ed Tech JPA's standard Purchase Agreement. Copies of Ed Tech JPA's standard Master Agreement and the Purchase Agreement are included in Appendix A of this document. Any exceptions or proposed alterations to conditions and requirements defined in this document and Ed Tech JPA's standard agreements must be included in Vendor's proposal and will be negotiated after award.

The Selected Vendor will guarantee that the proposed Products and services shall conform in all material respects to Ed Tech JPA's specifications in this RFP and the Selected Vendor's documentation accompanying or referred to in this RFP. Vendor may add or delete products introduced or removed from the market by the manufacturer under the following conditions: A) Deleted products have been discontinued and are no longer available from the manufacturer; or B) Added products are either a direct replacement for original products listed in the RFP, Vendor's Proposal, the Master Agreement and/or any Purchase Agreements, or added products are enriched capabilities, new modules, technology advancements, and/or service categories within the Solution that Vendor did not have at the time the RFP Proposal was submitted. To modify the Product list Vendor shall finalize an Amendment to both the Master Agreement and any applicable Purchase Agreements, with written approval by both parties.

If a Master Agreement is awarded as a result of this procurement process, all warranties made by the Selected Vendor, including the Vendor's Proposal, this RFP and any attachments, bulletins, supporting documentation, or addenda to the RFP shall be incorporated into the Master Agreement and shall be binding upon the Selected Vendor, both pursuant to the Master Agreement and in the execution of Purchase Agreement(s) with Participants. This RFP, any Addenda issued, the Selected Vendor's Proposal, and all supporting documentation will become a part of the Master Agreement and all subsequent Purchase Agreements. Any Proposal

attachments, documents, letters, and materials submitted by the Vendor shall be binding and may be included as part of the Master Agreement and Purchase Agreement. Submission of a successful Proposal is not the end of the contractual process; further negotiation over the Agreement terms and conditions will be necessary.

4.5 Covenant Against Gratuities

Vendor warrants by signing and submitting its Proposal in response to this RFP that no gratuities (in the form of entertainment, gifts, or otherwise) were offered or given by Vendor or any agent or representative of Vendor to any officer or employee of Ed Tech JPA with a view toward securing the contract or securing favorable treatment with respect to any determinations concerning the performance of the contract.

For breach or violation of this warranty, Ed Tech JPA shall have the right to terminate the contract, either in whole or in part, and any loss or damage sustained by the Ed Tech JPA or its Members in procuring on the open market any services which Vendor agreed to supply shall be borne and paid for by Vendor. The rights and remedies of Ed Tech JPA or its Members provided in the clause shall not be exclusive and are in addition to any other rights and remedies provided by law or under the Master Agreement or Purchase Agreement.

5.0 Rules

The following rules and regulations must be followed by every Vendor and subcontractor doing business with Participants. Failure to comply may result in the removal of Vendor and/or members of Vendor's crew from the job, and possible back charges for Participants' direct costs.

5.1.1 Participants are tobacco free organizations. The use of tobacco or tobacco products is prohibited on any part of the Participant grounds.

5.1.2 Vendor agrees to abide by all applicable city laws, including those relating to hours and noise of construction work. If Vendors want to work other than hours approved by the city, Vendor must get a waiver from the city.

5.1.3 Anyone not directly involved in the scope of work shall not be on the job site, or Participant property. Vendor assumes full responsibility for all parties on the site who are there as a result of their direct or indirect involvement with the Vendor.

5.1.4 No music, i.e. radios, cassettes, CD's, iPods, headphones, or other electronic or acoustic device, etc.

5.1.5 No pets are allowed on Participant property.

5.1.6 Fraternalization or other contact with students is strictly forbidden.

5.1.7 Any Vendor working on a site where students are present when Participant has determined that the Vendor's employees or employees of subcontractor will have more than limited contact with Participant pupils must supply the Participant with certification that all employees on the project have been fingerprinted and approved per state law and Participant Board policy. Vendor must agree to abide by all Participating Association Member policies to enforce the safety of students.

5.1.8 The Vendor shall supply Certificate of Insurance coverages, as outlined in the Insurance Requirement Acknowledgement prior to the start of work (Appendix B).

5.1.9 Vendor is required to collect, haul and dispose of all debris, trash and spoilage associated to this project. Vendor shall keep all items secured and maintained in a safe manner until properly disposed of.

5.1.10 Care must be taken to minimize damage to the surrounding work environment. All areas affected by the project are to be restored to a pristine condition. This includes replacement of any damaged property or equipment, painting, woodwork, wood staining, trim, cabinetry, carpentry, masonry and all other areas as needed.

5.1.11 Participant has a **Zero Tolerance Policy** that will be enforced towards negative or questionable conduct or behavior.

5.1.12 While on Participants' property and/or project area there will be **No Fraternalizing** by the Vendor's workforce with anyone outside the project's workforce.

5.1.13 Professional and Neat Appearance of workforce shall be maintained at all times. No offensive, suggestive, or inappropriate attire will be permitted.

5.1.14 Use of foul, slanderous, offensive, discourteous or disrespectful language WILL NOT be tolerated.

5.1.15 **"Cruising" or "Loitering" on Participant property or job site is not permitted** at any time. Employees or associates of the Vendor when not engaged in official activities as directed by their employer shall leave Participants' property until the next work call.

5.1.16 Vendor or its employees or associates are not allowed to be in any area of the Participants' property that has not been specifically authorized by Participant or its designee without an official and designated escort.

5.1.17 Vendor will remove and replace all furniture and equipment as required. Vendor will make liaison with the appropriate designated representative on relocation of any equipment. Note: the greatest care is to be taken in all cases when dealing with Participant equipment. Any damage is at the Vendor's expense. Vendor must notify Participant two (2) days in advance when personal items must be removed or may be affected by the Vendor.

5.1.18 Vendor shall maintain the project area in the highest state of safety and cleanliness. During the work shift the areas will be kept orderly and not allowed to become cluttered or in a state where safety is compromised. At the end of each shift Vendor shall ensure that all project equipment, material and debris is properly stowed and secured, or picked up and disposed of as appropriate.

5.1.19 Vendor will be required, as part of the Master Agreement with EdTech JPA to indemnify EdTech JPA and related persons under certain circumstances. Vendor is directed to those sections in the Master Agreement.

5.1.20 Vendor will also be required by the Purchase Agreement to indemnify the Participant and related persons under certain circumstances. Vendor is directed to those sections in the Purchase Agreement.

5.1.21 Vendor, when required by law, and at the request of Participant, shall pay prevailing wages.

5.1.22 Based on the installation plan supplied to the Participant for a particular site or sites, the Participant may require the Provider to obtain a payment bond, a performance bond, or both.

5.1.23 Each Associate Member of Ed Tech JPA may have additional Rules, which will be provided to Vendor upon request. Vendor agrees to adhere to the Rules for each Associate Member and/or Founding Member that it contracts with.

6.0 Proposal Format

All Proposals shall be submitted on the attached Proposal Form, provided as Attachment 1. These instructions prescribe the mandatory Proposal Form and the approach for the development and presentation of Proposal information. Proposal Form instructions must be adhered to, all questions must be answered, and all requested data must be supplied. Vendor response to each of the minimum requirements in this RFP is required. Failure to respond or

non-adherence to any minimum requirement in this section may be cause for the Proposal to be rejected.

Vendor shall submit a Proposal Form with all information requested. The Proposal should be as clear, complete, and consistent as possible. Some items in this section request a direct response or supporting information from the Vendor. Other items are written as statements of compliance. Vendor must confirm compliance/conformance to all statements in its response. All sections and subsections must be addressed. All documents requiring Vendor signature shall be executed by a duly authorized representative of Vendor.

In addition to responding to the defined minimum requirements, Ed Tech JPA encourages Vendor to submit information about additional functionality or services not specifically requested in the RFP and documentation to support the claims in the proposal. Vendor's proposal should be constructed to provide a complete picture of the features of the proposed Solution, the Vendor's ability to perform, and functionality or services that may distinguish the proposed Solution from other competitive offerings. Proposals will be evaluated both on the satisfaction of Ed Tech JPA's minimum requirements, as well as the additional information submitted by Vendors to depict their complete Solutions. Additional material may be submitted with the proposal as appendices. No brochures or marketing materials will be considered when scoring Proposals. Any additional descriptive material that is used in support of any information in Vendor's proposal must be clearly identified.

Vendors must meet all essential requirements in each Section completed in Vendor's response to be awarded a Master Agreement pursuant to this RFP. Essential requirements are denoted with two asterisks (). If Vendor does not offer aspects of a solution Vendor may leave the Section asking for details about the Products not offered blank, and make a note "Not Included".**

Appendix A: Standard Master Agreement and Standard Purchase Agreement

ED TECH JPA MASTER AGREEMENT: RFP No. #
Services Platform

This Master Agreement (“MA”), is made as of **DATE** (“Effective Date”), by and between the Education Technology Joint Powers Authority (“ED TECH JPA”) and **INSERT** (“VENDOR”).

BACKGROUND

A. Education Technology JPA is a Joint Powers Authority formed by California public school districts, county offices of education, and community college districts pursuant to California Government Code Sections 6500-6536. ED TECH JPA aggregates purchasing power and expertise for its Members.

B. ED TECH JPA establishes its contracts for products and services through the following process:

1. On **DATE**, ED TECH JPA issued a Request for Proposal for **SERVICES Platform** (the “RFP”) on behalf of ED TECH JPA members. ED TECH JPA invited qualified vendors to submit pricing products and services in response to the RFP.
2. ED TECH JPA published the RFP on its Website and in a local periodical:
3. ED TECH JPA received one or more responses to the RFP. ED TECH JPA evaluated all responses which complied with the terms of the RFP, using the following criteria: Functionality and Usability, Vendor Support and Ability to Perform, Price, and Technology Requirements.
4. ED TECH JPA selected VENDOR for an award under the RFP for **Services Platforms** (the “Products”). The parties are entering this Master Agreement (“MA”) to evidence the terms and conditions of that award.

AGREEMENT

Now, therefore, for good and valuable consideration, the parties agree as follows.

1. GRANT AND ACCEPTANCE OF AWARD

ED TECH JPA awards this MA to VENDOR under the RFP with respect to the products or services (“Products”) at the prices listed in Exhibit B. VENDOR accepts the award and confirms VENDOR’s acceptance of all terms and conditions of the RFP, which are incorporated herein by this reference. The RFP, VENDOR’s proposal in response to the RFP (“VENDOR’s Proposal”), and the Standard Student Data Privacy Agreement are incorporated herein by this reference. This MA includes the services and pricing offered in VENDOR’s Proposal, as identified in Appendix C, Pricing Form. Prices will remain valid for all Participating Associate Members of ED TECH JPA through the expiration of the MA.

2. TERM

The term of this MA (the "Term") shall commence on the Effective Date and shall expire after a period of five (5) years. The Agreement may be terminated by Ed Tech JPA or Member for convenience after three years by the giving of notice of at least thirty (30) days before the expiration of the (3) year term. The parties understand that Participants may order Products under this MA to be delivered after the Term of this MA; in some cases, Products may be delivered over multiple years after the Term. The expiration or termination of this MA shall not affect VENDOR's obligation to deliver Products as ordered by Participants during the Term.

3. PARTICIPANTS

The pricing, terms, and conditions of this MA will be made available to ED TECH JPA Founding Members, Associate Members and to other "Eligible Entities" who elect to become Associate Members of the ED TECH JPA. Eligible Entities are all California public school districts, county offices of education, and community college districts, and any other public agency in the United States whose procurement rules, whether internal rules or rules enacted pursuant to statute, allow them to purchase Products through a procurement vehicle such as ED TECH JPA and public agencies outside of California who have verified that they are eligible to participate. A "Participant" or "Participating Associate Member" is an Eligible Entity who chooses to purchase items through this MA, including Associate Members and Founding Members.

VENDOR acknowledges that each Participant is responsible for (a) completing their own due diligence regarding the suitability of VENDOR and Products for Participant's needs, (b) entering into one or more Purchase Agreements with VENDOR to document the quantities, total costs, and delivery terms for Products, (c) and coordinating implementation of Products with VENDOR. VENDOR is not under any contractual obligation to provide Products to Participants until such time as both a MA and a Purchase Agreement have been fully executed. The RFP was conducted for the limited purposes specified in the RFP. ED TECH JPA does not provide assurance or warranty to VENDOR with respect to other issues, including Participant's payments to VENDOR. ED TECH JPA will not assist in implementation or represent VENDOR in the resolution of disputes with Participants.

4. PURCHASE AGREEMENTS

Participating Associate Members may browse products on the JPA website. Prior to executing the Purchase Agreement ("PA"), Associate Members will work with a VENDOR representative to determine the VENDOR implementation timeline and implementation plan ("Implementation Plan") as further described in Section 2.2 of the RFP. To confirm a Participant's request to buy Products using the RFP, Participant and VENDOR must complete and execute a Purchase Agreement ("PA") for the specific Products. VENDOR shall provide a copy of complete PAs to ED TECH JPA within 30 days of request by ED TECH JPA.

The PA will contain a general description of the Products ordered, contact information for VENDOR and Participant related to purchase and sale of the Products, and an acknowledgement that the purchase is subject to the terms of the RFP and this MA. Participant



and VENDOR may agree on contingencies, such as timing contingencies, applicable to delivery of Products.

A report outlining all completed PAs must be presented to ED TECH JPA at the same time the Administrative Fee is paid to Ed Tech JPA, at the same due date listed in Section 15.b.. VENDOR will work directly with a Participating Associate Member to fulfil the order according to the parties' agreed-upon Implementation Plan. ED TECH JPA is not responsible to verify payment to VENDOR.

5. PROGRAM PROMOTION

It is in the interest of both parties that VENDOR will promote and support ED TECH JPA Master Agreements using methods that best suit the VENDOR's business model, organization, and market approach. ED TECH JPA specifically desires VENDOR to generate interest in the MA, and direct its existing clients who are Eligible Entities to use its MA as VENDOR's preferred form of contracting with Eligible Entities.

VENDOR may be asked to participate with ED TECH JPA staff in related trade shows, conferences, and online presentations to promote the MA. ED TECH JPA will promote MAs through the creation of marketing materials, as well as active outreach to its constituents.

ED TECH JPA expects VENDOR's field and internal sales forces will be trained and engaged in use of the MA for the duration of the contract term. VENDOR agrees that all sales will be accurately and timely reported to ED TECH JPA. VENDOR shall provide a single point of contact with the authority and responsibility for the overall success of promotion of the MA.

ED TECH JPA may schedule periodic reviews with VENDOR to evaluate VENDOR's performance of the commitments outlined in this MA, as well as leads, current projects and projected sales.

6. INVOICING FOR SERVICES

VENDOR shall invoice each Participant for Products and Participant shall disburse payment to VENDOR upon receipt of the Board approved, executed Purchase Agreement between Participating Associate Member and VENDOR. ED TECH JPA does not guarantee timely payment. The Purchase Agreement is between VENDOR and Participant.

7. PRODUCT ADDITIONS/DELETIONS

VENDOR may add or delete Products introduced or removed from the market by the manufacturer under the following conditions:

- A) Deleted Products have been discontinued and are no longer available from the manufacturer;

- B) Added Products are either a direct replacement or are substantially equivalent to original products listed in the RFP, VENDOR's Proposal, the Master Agreement and/or any Purchase Agreements, or Added Products are enriched capabilities, new modules, technology advancements, and/or service categories within the Products that VENDOR did not have at the time the RFP Proposal was submitted;
- C) VENDOR has obtained prior written Board approval from Ed Tech JPA;
- D) VENDOR receives an executed Amendment to the Master Agreement;
- E) VENDOR has obtained any required prior written Board approval from Participating Associate Members; and
- F) VENDOR receives an executed Amendment to any applicable Purchase Agreement.

8. MINIMUM PRICE GUARANTEE

VENDOR agrees not to sell directly, or through a reseller, the Product(s) subject to the Master Agreement at a price lower than the price offered pursuant to the RFP and this Master Agreement to ED TECH JPA's Eligible Entities located in California (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.

During the period of delivery under a contract resulting from this RFP, if the price of an item decreases, Ed Tech JPA Participating Associate Members shall receive a corresponding decrease in prices on the balance of the deliveries for as long as the lower prices are in effect. Vendor agrees to amend the Master Agreement to reflect the decreased pricing. At no time shall the prices charged to Ed Tech JPA Participating Associate Members exceed the prices under which the RFP was awarded. Ed Tech JPA Participating Associate Members shall be given the benefit of any lower prices which may, for comparable quality and delivery, be given by the Vendor to any other school district or any other state, county, municipal or local government agency in a California County for the product(s) listed in the RFP.

9. EXPENSES.

ED TECH JPA shall not be liable to VENDOR for any costs or expenses paid or incurred by VENDOR in providing Products and Services for ED TECH JPA or Associate Members.

10. COMPLIANCE WITH APPLICABLE LAW

The Products completed herein must meet the approval of the ED TECH JPA and shall be subject to the ED TECH JPA's general right of inspection to secure the satisfactory completion thereof. VENDOR agrees to comply with all federal, state and local laws, rules, regulations and ordinances that are now or may in the future become applicable to VENDOR, VENDOR's business, the Products, equipment and personnel engaged in Products covered by this MA or

accruing out of the performance of such Products. If VENDOR performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, VENDOR shall bear all costs.

11. DATA PRIVACY

VENDOR agrees that all products and services are fully compliant with all applicable requirements including all state and federal laws. VENDOR has executed the Standard Student Data Privacy Agreement (NDPA), attached to the RFP as Appendix E.

12. PERMITS/LICENSES

VENDOR and all VENDOR’s employees or agents shall secure and maintain in force such permits and licenses as are required by law in connection with the furnishing of Products pursuant to this MA.

13. INSURANCE

VENDOR shall insure VENDOR’s activities in connection with the Products under this MA and agrees to carry insurance as specified in the RFP to ensure VENDOR’s ability to adhere to the indemnification requirements under this MA.

14. TRANSACTION REPORTING

VENDOR will comply with all reasonable requests by ED TECH JPA for information regarding VENDOR’s transactions with Participants, including transmittal of transaction data in electronic format. VENDOR will report to ED TECH JPA all Services ordered by Participants, in reasonable detail, not later than the reporting period outlined in section 15.B. of this MA. VENDOR acknowledges that ED TECH JPA will track the use of this MA through databases managed by ED TECH JPA. A template Usage Report is attached hereto as Exhibit A.

15. ADMINISTRATIVE FEE

- A. VENDOR agrees to pay ED TECH JPA an administrative fee (the “Administrative Fee”) calculated as four percent (4%) of the gross invoiced amount of any Participant agreement with VENDOR based on an award under the RFP and all revenue derived directly from any Participant Agreement, including any Additional Services, or agreement extensions or renewals. Vendors whose gross sales exceed two million dollars (\$2,000,000.00) each fiscal year may receive a discount and pay Administrative Fees as follows:

Sales Amount*	Administrative Fee**
\$2,000,000.00 - \$3,999,999.99	3.5%
\$4,000,000.00 and above	3%

*The fiscal year term is July 1 - June 30.

**Sales are the annual gross amount invoiced of any Participant Agreement with VENDOR based on an award under the RFP and all revenue derived directly from any

Participant Agreement, including any Additional Services, or agreement extensions or renewals.

***Any discounted Administrative Fee shall be applied to Sales in the quarter after the minimum threshold has been met. Discounted Administrative Fees shall revert to four percent (4%) after the minimum threshold is no longer met.

For purchases made with federal funds, a different fee structure may apply. Computations of the Administrative Fee shall exclude state, local, or federal taxes levied on invoiced amounts. Unless otherwise stated herein, the Administrative Fee is not refundable to Participants or Vendors under any circumstances. In the event ED TECH JPA's operating costs increase, the Administrative Fee is subject to an increase to offset such increased costs. Any increase shall be authorized by Ed Tech JPA's Board of Directors ("Board") and shall take effect on the day approved by the Board. Any increase shall be communicated to Vendors with no less than thirty (30) days notice from ED TECH JPA, and VENDOR shall be permitted to amend this MA to increase pricing in the attached Exhibit B in direct proportion to the adjusted Administrative Fee. Such amendment shall take immediate effect and apply to all Purchase Agreements executed after the execution date of the Amendment.

B. Administrative Fees shall be reported and payable at the end of each quarter as follows:

Reporting Period	Due Date
January 1 - March 31	April 30
April 1 - June 30	July 31
July 1 - September 30	October 31
October 1 - December 31	January 31

C. VENDOR must submit a check, payable to Education Technology Joint Powers Authority remitted to:

Ed Tech JPA
% Clovis Unified School District
Business Services Department
1450 Herndon Ave
Clovis, CA 93611

D. The administrative fee shall not be included as an adjustment to VENDOR's Ed Tech JPA Master Agreement pricing.

E. The administrative fee shall not be invoiced or charged to the Participating Associate Member.

- F. Payment of the administrative fee is due irrespective of payment status on orders or service contracts from Participating Associate Members.
- G. Any payments that a VENDOR makes or causes to be made to Ed Tech JPA after the due date as indicated on the Quarterly Report Schedule shall accrue interest at a rate of eighteen percent (18%) per annum or the maximum rate permitted by law, whichever is less, until such overdue amount shall have been paid in full. The right to interest on late payments shall not preclude Ed Tech JPA from exercising any of its other rights or remedies pursuant to this agreement or otherwise with regards to Vendor's failure to make timely remittances.
- H. Failure to meet administrative fee requirements and submit fees on a timely basis shall constitute grounds for suspension of this contract.

16. **CONTRACT MANAGEMENT**

- A. The primary VENDOR contract manager for this Master Agreement shall be as follows:
 - Name:**
 - Attn:**
 - Address:**
 - Email:**
 - Phone:**
- B. The primary Ed Tech JPA contract manager for this Master Agreement shall be as follows:

Education Technology JPA
Attn: Michelle Bennett
5050 Barranca Parkway
Irvine, CA 92604
MichelleBennett@iusd.org
949-936-5022
- C. Should the contract administrator information change, the changing party will provide written notice to the affected party with the updated information no later than ten (10) business days after the change.

17. **INDEMNIFICATION**

To the extent permitted under applicable law, VENDOR will defend, indemnify and hold harmless ED TECH JPA and its directors, officers, employees, and agents from and against all damages, costs (including reasonable attorneys' fees), judgments and other expenses arising out of or on account of any third party claim: (i) alleging that the product infringes or misappropriates the proprietary or intellectual property rights of such third party; (ii) that results from the negligence or intentional misconduct of VENDOR or its employees or agents; or (iii) that results from any breach of any of the representations, warranties or covenants contained herein by VENDOR or in any direct communication between VENDOR and any ED TECH JPA Member.

To the extent permitted under applicable law, ED TECH JPA will defend, indemnify and hold harmless VENDOR and its directors, officers, employees, and agents from and against all damages, costs (including reasonable attorneys' fees), judgments and other expenses arising out of or on account of any third party claim that results from (i) the negligence or intentional misconduct of ED TECH JPA or its employees or agents or (ii) any breach of any of the representations, warranties or covenants contained herein by ED TECH JPA.

18. ATTORNEYS' FEES

If any action at law or in equity is brought to enforce or interpret the provisions of this MA, the prevailing party shall be entitled to reasonable attorneys' fees in addition to any other relief to which the party may be entitled.

19. SEVERABILITY

In the event that any provision of this MA is held invalid or unenforceable by a court of competent jurisdiction, no other provision of this MA will be affected by such holding, and all of the remaining provisions of this MA will continue in full force and effect.

20. DEFAULTS

In the event that VENDOR defaults in its obligations under this MA, and if such default is not cured within 30 days after notice of the default from ED TECH JPA to VENDOR, then ED TECH JPA may pursue any available remedies against VENDOR, including but not limited to termination of this MA.

21. GOVERNING LAW AND VENUE

THIS MA WILL BE GOVERNED BY AND CONSTRUED IN ACCORDANCE WITH THE LAWS OF THE STATE OF CALIFORNIA, WITHOUT REGARD TO CONFLICTS OF LAW PRINCIPLES. EACH PARTY CONSENTS AND SUBMITS TO THE SOLE AND EXCLUSIVE JURISDICTION TO THE STATE AND FEDERAL COURTS LOCATED IN ORANGE COUNTY, CALIFORNIA FOR ANY DISPUTE ARISING OUT OF OR RELATING TO THIS MA OR THE TRANSACTIONS CONTEMPLATED HEREBY.

PROVISIONS REQUIRED BY LAW: VENDOR acknowledges that it has conducted and performed the required research to become aware and knowledgeable of all federal, state and local laws/statutes that are referenced herein, may pertain to and/or govern the procurement activities and transactions covered by this MA. These provisions of law and any clause required by law that is associated with this transaction will be read and enforced as though it were included herein.

22. NOTICES

All notices under this MA must be in writing and will be effective (a) immediately upon delivery in person or by messenger, (b) the next business day after prepaid deposit with a commercial courier or delivery service for next day delivery, (c) upon receipt by facsimile as established by

evidence of successful transmission, (d) when emailed to the receiving party at the receiving party's assigned email address with delivery receipt requested, upon electronic confirmation the transmission has been delivered, or (e) five (5) business days after deposit with the US Postal Service, certified mail, return receipt requested, postage prepaid. All notices must be properly addressed to the addresses set forth on the signature page to this MA, or at such other addresses as either party may subsequently designate by notice.

23. ASSIGNMENT

Neither party may assign its rights and obligations hereunder, either in whole or in part, whether by operation of law or otherwise, without the prior written consent of the other party. Notwithstanding the foregoing, either party may assign this Agreement in its entirety (including all Orders Forms and SOWs), without consent of the other party, to its Affiliate or in connection with a merger, acquisition, corporate reorganization, or sale of all or substantially all of its assets not involving a direct competitor of the other party. Subject to the foregoing, this Agreement shall bind and inure to the benefit of the parties, their respective successors and permitted assigns. An "Affiliate" for purposes of this Section 23 shall mean any entity which directly controls, is under common control with, or is directly or indirectly controlled by the party seeking to assign its rights and obligations hereunder.

24. COUNTERPARTS

This MA may be signed and delivered in two (2) counterparts, each of which, when so signed and delivered, shall be an original, but such counterparts together shall constitute the one instrument that is the MA, and the MA shall not be binding on any party until all Parties have signed it.

25. AUTHORIZED SIGNATURE

The individual signing this MA warrants that he/she is authorized to do so. The Parties understand and agree that a breach of this warranty shall constitute a breach of the MA and shall entitle the non-breaching party to all appropriate legal and equitable remedies against the breaching party.

26. SURVIVAL

The parties' respective obligations under the following sections of this MA shall survive any termination of this MA: Sections 13 through 21, covering Transaction Reporting, Administrative Fee, Indemnification, Attorneys' Fees, Severability, Defaults, Governing Law, and Notices.

27. EXHIBITS

This MA includes all documents referenced herein, whether attached hereto or otherwise incorporated by reference.

28. ENTIRE AGREEMENT AND ORDER OF PRECEDENCE. This MA, the RFP, VENDOR’s Proposal, and the NDPA are the entire agreements between the parties and supersede all prior and contemporaneous agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this MA will be effective unless in writing and signed by both parties. Notwithstanding any language to the contrary therein, no VENDOR terms or conditions stated in VENDOR’s Proposal, an invoice, or in any other documentation, will be incorporated into or form any part of this MA, and all such terms or conditions will be void. In the event of any conflict or inconsistency among the following documents, the order of precedence shall be: (1) any exhibit, schedule, or addendum to this Agreement; (2) this Agreement; (3) the NDPA; (4) any exhibit, schedule, or addendum to the PA; (5) the body of the PA; (6) VENDOR’s Proposal; and (7) the RFP.

29. ADDITIONAL INSURED ENDORSEMENT LANGUAGE

Any general liability policy provided by VENDOR hereunder shall contain an endorsement which applies its coverage to ED TECH JPA, members of ED TECH JPA’s board of trustees, and the officers, agents, employees and volunteers of ED TECH JPA, individually and collectively, as additional insureds.

“ED TECH JPA, its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory.”

IN WITNESS WHEREOF, the parties have executed this Master Agreement as of the Effective Date.

ED TECH JPA

VENDOR

By: Brianne Ford
President of the Board

By:
Its:

Date

Date

Exhibit B

ED TECH JPA Pricing

ED TECH JPA PURCHASE AGREEMENT: [Product/RFP]

This Purchase Agreement (this "PA"), is made as of **DATE** (the "Effective Date"), by and between the **[INSERT ASSOCIATE MEMBER]** ("PARTICIPANT") and **[INSERT]** ("VENDOR").

BACKGROUND

A. Education Technology JPA ("ED TECH JPA") is a Joint Powers Authority formed by California public school districts, county offices of education, and community college districts pursuant to California Government Code Sections 6500-6536. ED TECH JPA aggregates purchasing power and expertise for its Members across California and members outside of California who have verified that they are eligible to participate.

B. ED TECH JPA establishes its contracts for products and services through the following process:

1. On **[DATE]**, ED TECH JPA issued a Request for Proposal for **[PRODUCT]** (the "RFP") on behalf of ED TECH JPA members. ED TECH JPA invited qualified vendors to submit pricing products and services in response to the RFP.

2. ED TECH JPA published the RFP on its Website and in a local periodical.

3. ED TECH JPA received one or more responses to the RFP. ED TECH JPA evaluated all responses which complied with the terms of the RFP, using the following criteria: Functionality and Usability, Vendor Support and Ability to Perform, Price, and Technology Requirements.

4. ED TECH JPA selected VENDOR for an award under the RFP for **[PRODUCT]** and services (the "Products") and thereafter entered into a Master Agreement (MA) to establish the terms by which Associate Members of the Ed Tech JPA may purchase products from Vendor.

C. A public entity using the Ed Tech JPA RFP to buy Products is a "Participant" or "Participant".

D. PARTICIPANT has completed its own due diligence regarding the suitability of VENDOR and Products for Participant's needs.

E. The parties are entering this PA to establish the terms and conditions of the purchase by Participant pursuant to that MA.

AGREEMENT

Now, therefore, for good and valuable consideration, the parties agree as follows.

1. PARTICIPATION IN MASTER AGREEMENT

This PA is subject to the terms of the RFP and the corresponding MA between ED TECH JPA and VENDOR, which are incorporated herein by this reference. VENDOR and PARTICIPANT agree (a) to the terms and conditions of the RFP and the MA covering the requested Products, (b) any additions or deletions to Products listed on this PA shall be promptly executed through an amendment to this PA, signed by VENDOR and PARTICIPANT.

VENDOR agrees as follows:

Vendor acknowledges that each PARTICIPANT is responsible for (a) completing their own due diligence regarding the suitability of VENDOR, (b) prior to executing a Purchase Agreement, PARTICIPANTS will work with a VENDOR representative to establish an Implementation Plan with the PARTICIPANT, as further described in Section 2.3 of the RFP, and (c) a Participant is not bound to a purchase until it has obtained approval from its Board and executed this Purchase Agreement with the VENDOR for the Product. VENDOR further acknowledges and agrees (c) by entering into one or more Purchase Agreements with PARTICIPANT, VENDOR is has agreed to the delivery terms for Products as established in the Implementation Plan and VENDOR will faithfully carry out timely implementation of the Products with PARTICIPANT. Order details, including an Additional Services, and the parties' Implementation Plan are attached hereto as Exhibit A.

PARTICIPANT agrees as follows:

PARTICIPANT acknowledges and agrees that (a) it has performed its own due diligence in selecting the VENDOR's Product and its suitability to Participant's needs, including using price as a significant factor, (b) VENDOR has provided a suitable Implementation Plan to Participant outlining all necessary dates and Participant needs, and (c) it will pay the costs as quoted by VENDOR in the RFP and the MA.

2. COMPLIANCE WITH APPLICABLE LAW

VENDOR agrees to comply with all federal, state and local laws, rules, regulations and ordinances that are now or may in the future become applicable to VENDOR, VENDOR's business, the Products, equipment and personnel engaged in Products covered by this PA or accruing out of the performance of such Products. If VENDOR performs any work knowing it to be contrary to such laws, ordinances, rules and regulations, VENDOR shall bear all costs.

3. DATA PRIVACY

VENDOR agrees that all Products and services are fully compliant with all applicable requirements including all state and federal laws. VENDOR has executed the Standard Student Data Privacy Agreement CA-NDPA (NDPA), attached to the RFP as Appendix E.

4. PERMITS/LICENSES

VENDOR and all VENDOR's employees or agents shall secure and maintain in force such permits and licenses as are required by law in connection with the furnishing of Products pursuant to this PA.

5. INSURANCE

VENDOR shall insure VENDOR's activities in connection with the Products under this PA and agrees to carry insurance as specified in the RFP to ensure VENDOR's ability to adhere to the indemnification requirements under this PA.

6. EQUIPMENT ADDITIONS/DELETIONS

VENDOR may add or delete equipment introduced or removed from the market by the manufacturer under the following conditions:

- A) Deleted Equipment has been discontinued and is no longer available from the manufacturer;
- B) Added Products are either a direct replacement or is substantially equivalent to original products listed in the RFP, VENDOR's Proposal, the Master Agreement and/or any Purchase Agreements, or Added Products are enriched capabilities, new modules, technology advancements, and/or service categories within the **PRODUCT** solution that VENDOR did not have at the time the RFP Proposal was submitted;
- C) VENDOR has obtained prior written Board approval from Ed Tech JPA;
- D) VENDOR receives an executed Amendment to the Master Agreement;
- E) VENDOR has obtained prior written Board approval from Participants; and
- F) VENDOR receives an executed Amendment to the Purchase Agreement.

7. INVOICING FOR SERVICES

The RFP Number and Name shall appear on each purchase order and invoices for all purchases placed under this Purchase Agreement. Unless otherwise agreed upon by both parties in writing, signing a delivery and acceptance certificate constitutes acceptance of the Products and allows VENDOR to invoice for the Products. ED TECH JPA does not guarantee timely payment. The Purchase Agreement is between VENDOR and Participant.

8. CONTRACT MANAGEMENT

- A. The primary VENDOR contract manager for this Purchase Agreement shall be as follows:

Name:

Attn:

Address:

Email:

Phone:

- B. The primary Participant contract manager for this Purchase Agreement shall be as follows:

Name:

Attn:

Address:

Email:

Phone:

- C. The primary Ed Tech JPA contract manager for this Purchase Agreement shall be as follows:

Education Technology JPA

Attn: Michelle Bennett

5050 Barranca Parkway
Irvine, CA 92604
edtechjpa@iusd.org
949-936-5022

D. Should the contract administrator information change, the changing party will provide written notice to the affected parties with the updated information no later than ten (10) business days after the change.

9. INDEMNIFICATION

VENDOR will defend, indemnify and hold harmless Participants and ED TECH JPA and their directors, officers, employees, and agents from and against all damages, costs (including reasonable attorneys' fees), judgments and other expenses arising out of or on account of any third party claim: (i) alleging that the product infringes or misappropriates the proprietary or intellectual property rights of such third party, except to the extent that such infringement results from (A) PARTICIPANT's misuse of the product, (B) Participant modifications to the product, or (C) PARTICIPANT continuing the allegedly infringing activity after VENDOR has provided PARTICIPANT with modifications that would have avoided the alleged infringement; (ii) that results from the negligence or intentional misconduct of VENDOR or its employees or agents; or (iii) that results from any breach of any of the representations, warranties or covenants contained herein by VENDOR. If the product becomes or, in VENDOR's opinion, is reasonably likely to become the subject of any injunction preventing use as contemplated herein for the reasons stated in this Section 14, VENDOR, or its designee, may, at its option, (i) procure for PARTICIPANT the right to continue using the Product, (ii) replace or modify the Product so that it becomes non-infringing without substantially compromising its functionality, or, if (i) and (ii) are not reasonably available to VENDOR, then (iii) terminate this PA as to the infringing Product, require the return of the allegedly infringing Product and/or refund to PARTICIPANT a portion of the fees paid by PARTICIPANT in respect of the Product depreciated on a straight-line basis over one (1) year from the Effective Date. VENDOR agrees to notify ED TECH JPA and Participant in the event of any claim against VENDOR alleging intellectual property infringement regarding Products and services listed in the RFP. VENDOR agrees to notify ED TECH JPA of any claims against VENDOR by any Participant.

(b) By PARTICIPANT. To the extent permitted under applicable law, PARTICIPANT agrees to defend, indemnify and hold harmless VENDOR and ED TECH JPA and their directors, officers, employees, and agents from and against all damages, costs (including reasonable attorneys' fees), judgments and other expenses arising out of or on account of any third party claim that results from (i) the negligence or intentional misconduct of PARTICIPANT or its employees or agents or (ii) any breach of any of the representations, warranties or covenants contained herein by PARTICIPANT.

(c) **DISCLAIMER OF LIABILITY.** ED TECH JPA does not provide assurance or warranty to VENDOR or PARTICIPANT with respect to issues arising under this PA, including Participant's payments to VENDOR. ED TECH JPA will not represent VENDOR or PARTICIPANT in the resolution of disputes arising under this PA.

10. ATTORNEYS' FEES

If any action at law or in equity is brought to enforce or interpret the provisions of this PA, the prevailing party shall be entitled to reasonable attorneys' fees in addition to any other relief to which the party may be entitled.

11. SEVERABILITY

In the event that any provision of this PA is held invalid or unenforceable by a court of competent jurisdiction, no other provision of this PA will be affected by such holding, and all of the remaining provisions of this PA will continue in full force and effect.

12. ASSIGNMENT

Neither party may assign its rights and obligations hereunder, either in whole or in part, whether by operation of law or otherwise, without the prior written consent of the other party. Notwithstanding the foregoing, either party may assign this Agreement in its entirety (including all Orders Forms and SOWs), without consent of the other party, to its Affiliate or in connection with a merger, acquisition, corporate reorganization, or sale of all or substantially all of its assets not involving a direct competitor of the other party. Subject to the foregoing, this Agreement shall bind and inure to the benefit of the parties, their respective successors and permitted assigns. An "Affiliate" for purposes of this Section 12 shall mean any entity which directly controls, is under common control with, or is directly or indirectly controlled by the party seeking to assign its rights and obligations hereunder.

13. DEFAULTS

In the event that VENDOR defaults in its obligations under this PA, and if such default is not cured within 30 days after notice of the default from ED TECH JPA to VENDOR, then ED TECH JPA may pursue any available remedies against VENDOR, including but not limited to termination of this PA.

14. GOVERNING LAW AND VENUE

THIS PA WILL BE GOVERNED BY AND CONSTRUED IN ACCORDANCE WITH THE LAWS OF THE STATE OF CALIFORNIA, WITHOUT REGARD TO CONFLICTS OF LAW PRINCIPLES. EACH PARTY CONSENTS AND SUBMITS TO THE SOLE AND EXCLUSIVE JURISDICTION TO THE STATE AND FEDERAL COURTS IN THE COUNTY WHERE PARTICIPANT IS LOCATED FOR ANY DISPUTE ARISING OUT OF OR RELATING TO THIS PA OR THE TRANSACTIONS CONTEMPLATED HEREBY.

PROVISIONS REQUIRED BY LAW: VENDOR acknowledges that it has conducted and performed the required research to become aware and knowledgeable of all federal, state and local laws/statutes that are referenced herein, may pertain to and/or govern the procurement activities and transactions covered by this PA. These provisions of law and any clause required

by law that is associated with this transaction will be read and enforced as though it were included herein.

15. NOTICES

All notices under this PA must be in writing and will be effective (a) immediately upon delivery in person or by messenger, (b) the next business day after prepaid deposit with a commercial courier or delivery service for next day delivery, (c) upon receipt by facsimile as established by evidence of successful transmission, (d) when emailed to the receiving party at the receiving party's assigned email address with delivery receipt requested, upon electronic confirmation the transmission has been delivered, or (e) five (5) business days after deposit with the US Postal Service, certified mail, return receipt requested, postage prepaid. All notices must be properly addressed to the addresses set forth on the signature page to this PA, or at such other addresses as either party may subsequently designate by notice.

16. COUNTERPARTS

This PA may be signed and delivered in two (2) counterparts, each of which, when so signed and delivered, shall be an original, but such counterparts together shall constitute the one instrument that is the PA, and the PA shall not be binding on any party until all Parties have signed it.

17. AUTHORIZED SIGNATURE

The individual signing this PA warrants that he/she is authorized to do so. The Parties understand and agree that a breach of this warranty shall constitute a breach of the PA and shall entitle the non-breaching party to all appropriate legal and equitable remedies against the breaching party.

18. TERM & TERMINATION

The term of this PA (the "Term") shall commence on the Effective Date and shall expire after a period of **number (#)** years. The parties understand that PARTICIPANTS ordering Products pursuant to the Master Agreement may extend for multiple years after the Term of the Master Agreement, upon mutual written consent of both parties, for a term not to exceed five years. The expiration or termination of the Master Agreement shall not affect VENDOR's obligation to deliver Products as ordered by PARTICIPANTS pursuant to this PA.

TERMINATION OF CONTRACT

Without limiting any rights or remedies which PARTICIPANT may have in the event of any default by VENDOR, PARTICIPANT shall have the right, upon fifteen (15) days' prior written notice to VENDOR, to terminate this PA at any time and without cause prior to complete delivery. Such termination shall be without any obligation or liability to VENDOR other than payment of charges for the value of work performed, and for necessary expenditures which can be established by VENDOR as having been reasonably incurred prior to the time that notice of termination is given. In no event shall the termination charges exceed the purchase price of the equipment/services. In the event of any termination, PARTICIPANT shall be entitled to all materials, work in process, and completed work included as value of work performed and

necessary expenditures in determining the charges referred to above and paid by PARTICIPANT. VENDOR agrees to allow mutual contract termination in whole or in part, in the event that PARTICIPANT does not allocate funding for the continuation of this contract or any portion thereof. In the event of termination due to non-allocation of funds, both parties shall be held without fault and there shall be no financial consequences assessed as a penalty on either party.

19. SURVIVAL

The parties' respective obligations under the following sections of this PA shall survive any termination of this PA: Sections 6 through 12, covering Administrative Fee, Indemnification, Attorneys' Fees, Severability, Defaults, Governing Law, and Notices.

20. EXHIBITS

This PA includes all documents referenced herein, whether attached hereto or otherwise incorporated by reference.

21. ENTIRE AGREEMENT AND ORDER OF PRECEDENCE. The RFP, VENDOR's Proposal in response to the RFP, the MA, the NDPA and this PA are the entire agreement between the parties and supersede all prior and contemporaneous agreements, proposals or representations, written or oral, concerning its subject matter. No modification, amendment, or waiver of any provision of this PA will be effective unless in writing and signed by the party against whom the modification, amendment or waiver is to be asserted. Notwithstanding any language to the contrary therein, no VENDOR terms or conditions stated in VENDOR's Proposal, an invoice, or in any other documentation, will be incorporated into or form any part of this PA, and all such terms or conditions will be void. In the event of any conflict or inconsistency among the following documents, the order of precedence shall be: (1) any exhibit, schedule, or addendum to the MA; (2) the MA; (3) the NDPA; (4) any exhibit, schedule, or addendum to this Agreement; (5) the body of this Agreement; (6) VENDOR's Proposal; and (7) the RFP.

22. ADDITIONAL INSURED ENDORSEMENT LANGUAGE

Any general liability policy provided by VENDOR hereunder shall contain an endorsement which applies its coverage to PARTICIPANT, members of PARTICIPANTS's board of trustees, and the officers, agents, employees and volunteers of PARTICIPANT, individually and collectively, as additional insureds.

“**[Participating Associate Member Name]**, its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by District shall be excess and noncontributory.”

IN WITNESS WHEREOF, the parties have executed this Purchase Agreement as of the Effective Date.

PARTICIPANT/ASSOCIATE MEMBER

VENDOR

By:
Its:

By:
Its:

Date

Date

Exhibit A

Order Information and Implementation Plan

Appendix B: Required Forms

All required forms must be submitted as part of the Vendor's complete proposal on or before the Proposal Deadline specified in the calendar of events. Required Forms are listed below.

Proposal Submission Checklist

Master Agreement & Purchase Agreement Confirmation

Acknowledgment of Amendments to RFP

Vendor Representation and Certification

Noncollusion Declaration

Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters

Certification on Restrictions on Lobbying

Worker's Compensation Certificate

Drug-Free workplace

Tobacco Use Policy

Criminal Records Check Certification by Vendor

Disclosure of Proposal

W-9

Insurance Requirements Acknowledgement

Minimum Price Guarantee Acknowledgment

Administrative Fee Acknowledgment

Rules Acknowledgement

PROPOSAL SUBMISSION CHECKLIST

- Proposal Submission Checklist (Appendix B)
- Master Agreement & Purchase Agreement Confirmation (Appendix B)
- Acknowledgment of Amendments to RFP (Appendix B)
- Vendor Representation and Certification (Appendix B)
- Noncollusion Declaration (Appendix B)
- Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters (Appendix B)
- Certification on Restrictions on Lobbying (Appendix B)
- Workers' Compensation Certificate (Appendix B)
- Drug Free Workplace Certification (Appendix B)
- Tobacco Use Policy (Appendix B)
- Criminal Records Check Certification by Vendor (Appendix B)
- W-9 (Appendix B)
- Disclosure of Proposal
- Insurance Requirements Acknowledgement (Appendix B)
- Minimum Price Guarantee Acknowledgment (Appendix B)
- Administrative Fee Acknowledgment (Appendix B)
- Rules Acknowledgement (Appendix B)
- Pricing Form (Appendix C)
- Service Level and Maintenance Agreement (if applicable) (Appendix D)
- Sample Reports and Training Materials (Appendix D)
- Standard Student Data Privacy Agreement CA-NDPA (Appendix E)
- Proposal Form (Attachment 1)

Write out all answers using the Proposal Form in Attachment 1. Additional material may be submitted with the proposal as appendices. No brochures, marketing materials, or internal company documentation will be considered when scoring Proposals. Cross-references to the Proposal Form in additional materials will not be considered responsive. Any additional descriptive material that is used in support of any information in Vendor's proposal must be clearly identified.



MASTER AGREEMENT & PURCHASE AGREEMENT CONFIRMATION

Upon notification of selection and Board Approval by a Participant, the undersigned hereby promises and agrees to furnish all articles or services within the dates specified, in the manner and form and at the prices herein stated in strict accordance with the advertisement, specifications, proposals and general conditions all which are made a part of the Purchase Agreement.

Name under which business is conducted

--

Business Street Address

City

State Zip Code

--

Telephone Number:

--

IF SOLE OWNER, sign here:

I sign as sole owner of the business named above.

Signature

Date

--	--

Name

Title

--	--

IF PARTNERSHIP, sign here:

The undersigned certify that we are partners in the business named above and that we sign this purchase agreement with full authority so to do. (One (1) or more partners sign)

Signature

Date

--	--

Name

Title

--	--

Signature

Date

--	--

Name

Title



--	--

IF CORPORATION, sign here:

The undersigned certify that they sign this purchase agreement with full and proper authorization so to do.

Signature

Date

--	--

Corporation Legal Name

--

Name

Title

--	--

Incorporated under the laws of the State of

--

ACKNOWLEDGEMENT OF AMENDMENTS TO RFP

VENDOR HEREBY ACKNOWLEDGES RECEIPT OF ANY AND ALL AMENDMENTS TO THE RFP.

If Vendor has no knowledge of any amendments to the RFP having been issued to, or received by, Vendor, please check the following box:

Amendments

Amendment No	Date Published	Date Received

Signature

Date

--	--

Vendor Legal Name

--

Name

Title

--	--

VENDOR REPRESENTATION AND CERTIFICATION

The undersigned hereby acknowledges and affirms that:

- He/she is a duly authorized agent of the Vendor with the authority to submit a Proposal on behalf of the Vendor (corporate or other authorization confirmation may be requested prior to final contract execution).
- He/she has read the complete RFP documents and all amendments issued pursuant thereto.
- The Proposal complies with State conflict of interest laws. The Vendor certifies that no employee of its firm has discussed, or compared the Proposal with any other Vendor or District employee, and has not colluded with any other Vendor or District employee.
- If the Vendor’s Proposal is accepted by Ed Tech JPA, the Vendor will enter into a Master Agreement with Participants to provide the Services, Systems and Equipment described by the Proposal on the terms mutually acceptable to Participants and the Vendor.
- Ed Tech JPA reserves the right to reject any or all proposals.

I hereby certify that I am submitting the attached Proposal on behalf of

--

I understand that, by virtue of executing and returning this required response form with the Proposal, I further certify, that the Vendor understands and does not dispute any of the contents of the proposal requirements (except as may be noted in the response).

Signature	Date

Vendor Legal Name

Name	Title

NOTE: If Joint Venture, each member of the joint venture must provide a completed certificate form.

NONCOLLUSION DECLARATION



TO BE EXECUTED BY VENDOR AND SUBMITTED WITH PROPOSAL

(Public Contract Code section 7106) The undersigned declares:

I am the

--

(title) of

--

(Vendor), the party making the foregoing proposal.

The proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The proposal is genuine and not collusive or sham. The Vendor has not directly or indirectly induced or solicited any other vendor to put in a false or sham proposal. The Vendor has not directly or indirectly colluded, conspired, connived, or agreed with any vendor or anyone else to put in a sham proposal, or to refrain from submitting a proposal. The Vendor has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the Vendor or any other vendor, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other vendor. All statements contained in the proposal are true. The Vendor has not, directly or indirectly, submitted its proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, proposal depository, or to any member or agent thereof, to effectuate a collusive or sham proposal, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a Vendor that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the Vendor.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed as follows.

Signature

Date

--	--

Vendor Legal Name

--

Name

Title

--	--

City

State

--	--



CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

The

--

(Principal) of

--

(Vendor Name)

Certifies to the best of its knowledge and belief that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local), with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this proposal had one (1) or more public transactions (federal, state or local) terminated for cause or default.

If unable to certify to any of the statements in this certification, the participant shall attach an expiration to this certification.

I HEREBY CERTIFY AND AFFIRM THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTAND THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

Signature

Date

--	--

Vendor Legal Name

--

Name

Title

--	--



CERTIFICATION OF RESTRICTIONS ON LOBBYING

I hereby certify on behalf of

--

(name of offeror) that

--

(Firm name) meets the following qualifications:

1. No Federal appropriated funds have been paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

2. If any funds, other than Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the attached, Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions.

3. The undersigned shall require that the language of this certification be included in all subcontracts, and that all subcontractors shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Signature

Date

--	--

Vendor Legal Name

--

Name

Title

--	--

WORKERS' COMPENSATION CERTIFICATE

Labor Code Section 3700.

"Every employer except the state shall secure the payment of compensation in one or more of the following ways:

- a. By being insured against liability to pay compensation in one or more insurers duly authorized to write compensation insurance in this state.
- b. By securing from the Director of Industrial Relations a certificate of consent to self-insure either as an individual employer or as one employer in a group of employers, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his or her employees.
- c. For any county, city, city and county, municipal corporation, public DISTRICT, public agency or any political subdivision of the state, including each member of a pooling arrangement under a joint exercise of powers agreement (but not the state itself), by securing from the Director of Industrial Relations a certificate of consent to self-insure against workers' compensation claims, which certificate may be given upon furnishing proof satisfactory to the director of ability to administer workers' compensation claims properly, and to pay workers' compensation claims that may become due to its employees. On or before March 31, 1979, a political subdivision of the state which, on December 31, 1978, was uninsured for its liability to pay compensation, shall file a properly completed and executed application for a certificate of consent to self-insure against workers' compensation claims. The certificate shall be issued and be subject to the provisions of Section 3702."

I am aware of the provisions of Labor Code Section 3700 which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

Signature	Date
Vendor Legal Name	
Name	Title

(In accordance with Article 5 [commencing at Section 1860], Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any work under the contract.)



DRUG FREE WORKPLACE CERTIFICATION

This Drug-Free Workplace Certification is required pursuant to Government Code §8350, et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract for the procurement of any property or services from any State agency must certify that it will provide a drug-free workplace by doing certain specified acts. In addition, the Act provides that each contract awarded by a State agency may be subject to suspension of payments or termination of the contract and the Vendor may be subject to debarment from future contacting, if the state agency determines that specified acts have occurred.

Pursuant to Government Code §8355, every person or organization awarded a contract from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

- a. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensation, possession or use of a controlled substance is prohibited in the person's or organization's workplace and specifying actions which will be taken against employees for violations of the prohibition;
- b. Establishing a drug-free awareness program to inform employees about all of the following:
 - i. The dangers of drug abuse in the workplace;
 - ii. The person's or organization's policy of maintaining a drug-free workplace;
 - iii. The availability of drug counseling, rehabilitation and employee-assistance programs;
 - iv. The penalties that may be imposed upon employees for drug abuse violations;
- c. Requiring that each employee engaged in the performance of the contract be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract, the employee agrees to abide by the terms of the statement.

I the undersigned, agree to fulfill the terms and requirements of Government Code §8355 listed above and will publish a statement notifying employees concerning (a) the prohibition of controlled substance at the workplace, (b) establishing a drug-free awareness program, and (c) requiring that each employee engaged in the performance of the contract be given a copy of statement required by §8355 (a) and requiring that the employee agree to abide by the terms of that statement.

I also understand that if the Participant determines that I have either (a) made false certification herein, or (b) violated this certification by failing to carry out the requirements of §8355, that the contract awarded herein is subject to suspension of payments, termination, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of §8350, et seq.

I acknowledge that I am aware of the provisions of Government Code §8350, et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

Signature	Date

Vendor Legal Name

Name	Title



TOBACCO USE POLICY

In the interest of public health, Participant provides a tobacco-free environment. Smoking or the use of any tobacco products are prohibited in buildings and vehicles, and on any property owned, leased or contracted for, by the Participant. Failure to abide with this requirement could result in the termination of this contract.

I acknowledge that I am aware of Tobacco Use Policy and hereby certify that I and my employees will adhere to the requirements of the policy.

Signature	Date

Vendor Legal Name

--

Name	Title

NOTICE TO VENDORS REGARDING CRIMINAL RECORDS CHECK (EDUCATION CODE §45125.1)

Education Code §45125.1 provides that if the employees of any entity that has a contract with a school DISTRICT may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the Department of Justice together with a fee determined by the Department of Justice to be sufficient to reimburse the Department for its costs incurred in processing the application.

The Department of Justice shall ascertain whether the individual whose fingerprints were submitted to it has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department. When the Department of Justice ascertains that an individual whose fingerprints were submitted to it has a pending criminal proceeding for a violent felony listed in Penal Code §1192.7(c) or has been convicted of such a felony, the Department shall notify the employer designated by the individual of the criminal information pertaining to the individual. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the employer by first-class mail.

The contract shall not permit an employee to come in contact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a violent or serious felony. The Vendor shall certify in writing to the Board of Trustees of the school DISTRICT that none of its employees who may come in contact with pupils have been convicted of a violent or serious felony.

Penal Code §667.5(c) lists the following “violent” felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; lewd acts on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant inflicts great bodily injury on another; any robbery perpetrated in an inhabited dwelling; arson; penetration of a person’s genital or anal openings by foreign or unknown objects against the victim’s will; attempted murder; explosion or attempt to explode or ignite a destructive device or explosive with the intent to commit murder; kidnapping; continuous sexual abuse of a child; and carjacking.

Penal Code §1192.7 lists the following : “serious” felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; a lewd or lascivious act on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally inflicts great bodily injury on another, or in which the defendant personally uses a firearm; attempted murder; assault with intent to commit rape or robbery; assault with a deadly weapon on a peace officer; assault by a life prisoner on a non-inmate; assault with a deadly weapon by an inmate; arson; exploding a destructive device with intent to injure or to murder, or explosion causing great bodily injury or mayhem; burglary of an inhabited dwelling; robbery or bank robbery; kidnapping; holding of a hostage by a person confined in a state prison; attempt to commit a felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally uses a dangerous or deadly weapon; selling or furnishing specified controlled substances to a minor; penetration of genital or anal openings by foreign objects against the victim’s will; grand theft involving a firearm; carjacking; and a conspiracy to commit specified controlled substances offenses.



CRIMINAL RECORDS CHECK CERTIFICATION BY VENDOR
(AB 1610, 1612 and 2102)

To the Board of Trustees of Participant:

I,

(name)

certify that:

(Name of Vendor)

1. has carefully read and understands the Notice to Vendors Regarding Criminal Record Checks (Education Code §45125.1) required by the passage of AB 1610, 1612 and 2102.

2. Due to the nature of the work it will be performing for the Participant,

(Name of Vendor)

employees may have contact with students of the DISTRICT.

3. None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code §1192.7 and this determination was made by a fingerprint check through the Department of Justice.

I declare under penalty of perjury that the foregoing is true and correct.

Signature

Date

<input type="text"/>	<input type="text"/>
----------------------	----------------------

Vendor Legal Name

Name

Title

<input type="text"/>	<input type="text"/>
----------------------	----------------------

City

State

<input type="text"/>	<input type="text"/>
----------------------	----------------------

DISCLOSURE OF PROPOSAL

I hereby agree to the posting of this **full Proposal** and supporting documents on a password protected website available only to active Ed Tech JPA Members.

OR

I agree to the posting of a **redacted Proposal** and supporting documents on a password protected website available only to active Ed Tech JPA Members.

Signature

Date

--	--

Vendor Legal Name

--

Name

Title

--	--



W-9

Current Version Available at: <http://www.irs.gov/pub/irs-pdf/fw9.pdf>

Please be sure to enter Vendor's full legal name. This is the name that will be used for awarded vendors.

Insurance Requirements Acknowledgement

These are the Insurance Requirements for Vendors providing services or supplies to Ed Tech JPA, and its Founding Members and Associate Members. By submitting a proposal, you verify that you comply with and agree to be bound by these requirements. If any additional Contract documents are executed, the actual Insurance Requirements may include additional provisions as deemed appropriate by Ed Tech JPA and the Participant. All insurers must be duly licensed and admitted by the State of California.

Mandatory Requirements (unless Participant reduces or excludes coverage requirements)

1. Commercial General Liability insurance for bodily injury and property damage, including accidental death in the combined single limit of not less than \$1,000,000 per occurrence (\$2,000,000 aggregate) and \$3,000,000 Excess/Umbrella Liability.

Minimum Limits (If required by Participant)

1. Workers' Compensation and Employer's Liability insurance in the amount of not less than \$1,000,000 per occurrence.

2. Professional Liability insurance in an amount of not less than \$1,000,000 per occurrence (\$2,000,000 aggregate). If Professional Liability policy is made on a claims-made basis, the vendor/consultant must purchase and maintain an extending reporting period (tail coverage) for one year.

Any insurance proceeds in excess of the specified limits and coverage required, which are applicable to a given loss, shall be available to Ed Tech JPA or Participant, as applicable. No representation is made that the minimum Insurance requirements of this agreement are sufficient to cover the indemnity or other obligations of the Vendor under this RFP, Master Agreement and Purchase Agreements with Associate Members.

Optional Insurance

Cyber Risk insurance to cover both tangible and intangible property risk of the system and data, as well as third party liability for breaches of security is encouraged, but not required by EdTech JPA. Desired coverage includes: i. Security and privacy liability, including privacy breach response costs, regulatory fines and penalties; ii. Media liability, including infringement of copyright, trademark and trade dress (intellectual property by appearance of product, design, or packaging); iii. Cyber extortion; and iv. Privacy. Suggested limits of not less than \$2,000,000 per occurrence, or sufficiently broad to respond to the duties and obligations as is undertaken by the Vendor in this RFP, Master Agreement and Purchase Agreements with Associate Members. The Policy should include, or be endorsed to include, property damage liability coverage for damage to, alteration of, loss of, or destruction of electronic data and/or information "property" of the Agency in the care, custody, or control of the Vendor.

Additional Insured Endorsement Language

"[Participant Name], its Board of Trustees, officers, agents, employees, and volunteers are named as additionally insured on this policy pursuant to written contract, agreement, or memorandum of understanding. Such insurance as is afforded by this policy shall be primary, and any insurance carried by



District shall be excess and noncontributory.”

Additional Insured Endorsements are required to accompany Certificates of Insurance. Certificate of Insurance shall provide thirty (30) day prior written notice of cancellation.

Additional Required Documents

Certificates of Insurance must be accompanied by a list of all excluded coverages under the general liability and excess/umbrella liability policies. The exclusion policy document section must be provided to Participants. The general liability and excess/umbrella liability documents must list the corresponding policy numbers referenced on the Certificate of Insurance.

Individual Associate Member Requirements

Individual Associate Members may have different/additional requirements than the minimum insurance requirements specified herein. Vendor agrees to maintain insurance that meets the requirements of individual Associate Members.

I hereby agree to the insurance requirements specified herein.

Signature	Date

Vendor Legal Name

Name	Title

Minimum Price Guarantee Acknowledgment

To prevent underpricing and protect seller Margin, Vendor’s pricing shall be subject to a Minimum Price Guarantee (MPG), whereby, 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 Products(s) subject to the Master Agreement at a price lower than the price offered pursuant to the RFP and the Master Agreement.

During the period of delivery under a contract resulting from this RFP, if the price of an item decreases, Ed Tech JPA Participants shall receive a corresponding decrease in prices on the balance of the deliveries for as long as the lower prices are in effect. Vendor agrees to amend the Master Agreement to reflect the decreased pricing. At no time shall the prices charged to Ed Tech JPA Participants exceed the prices under which the RFP was awarded. Ed Tech JPA Participants shall be given the benefit of any lower prices which may, for comparable quality and delivery, be given by the Vendor to any other school district or any other state, county, municipal or local government agency in a California County for the product(s) listed in the RFP.

I hereby agree to the Minimum Price Guarantee specified herein.

Signature	Date
Vendor Legal Name	
Name	Title



Administrative Fee Acknowledgment

VENDOR agrees to pay ED TECH JPA an administrative fee (the “Administrative Fee”) calculated as four percent (4%) of the gross invoiced amount of any Participant agreement with VENDOR based on an award under the RFP and all revenue derived directly from any Participant Agreement, including any Additional Services, and agreement extensions or renewals. Vendors whose gross sales exceed two million dollars (\$2,000,000.00) may be eligible to pay a discounted Administrative Fee. Computations of the Administrative Fee shall exclude state, local, or federal taxes levied on invoiced amounts. The Administrative Fee must be included when determining the pricing offered. The Administrative Fee is not negotiable and shall not be added as a separate line item on an invoice. The Administrative Fee is not refundable to Participants or Vendors under any circumstances.

I hereby agree to the Administrative Fee specified herein.

Signature	Date
<input type="text"/>	<input type="text"/>
Vendor Legal Name	
<input type="text"/>	
Name	Title
<input type="text"/>	<input type="text"/>



Rules Acknowledgement

I hereby agree to the Rules specified in Section 6.0 of this RFP.

Signature

Date

--	--

Vendor Legal Name

--

Name

Title

--	--

Appendix C: Pricing Form

Detail all costs associated with the proposed Solution, including, but not limited to, complete delivery, the implementation, installation, configuration, software licensing, maintenance, ongoing support, repairs, parts, recommended professional services, taxes and surcharges, and costs of optional services and products. Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.

- One Time Costs
- Annual Recurring Costs
- Optional Services/Solutions and Costs

One-Time Costs: Expand the following table as required to provide pricing for the proposed Solution to meet the requirements specified in this RFP.

Vendor Name:

One-Time Costs			
Item	Description	Unit Cost <i>(Indicate Flat Cost or Per Student, Staff, User, etc.)</i>	Estimated Total Cost
Implementation	<i>Including but not limited to: Data Integration, Transition from Existing Systems, Project Management, Professional Services, Configuration Support, User/Permissions Setup Training (Core IT Staff, District Trainers and Teachers)</i>		
Training	<i>Including but not limited to: Training Services (Core IT Staff, District Trainers and Teachers), Training Documentation (Electronic and Editable per RFP)</i>		
Other	<i>Please Describe:</i>		
Total One-Time Costs:			

Annual Recurring Costs: Expand the following tables as required to provide pricing for the proposed system to meet the requirements specified in this RFP. Include Software Upgrade Costs and Maintenance Support and Assurance. Explain any escalation or price change for each year if pricing for each year is not identical. Provide the hourly rate for services not covered by warranty or service contracts. If pricing is different based on quantity of licenses purchased, or any other factor(s), please provide pricing for Tier 1 and Tier 2, along with specifications to qualify for each Tier. If inadequate specifications are made Participants may select which Tier they belong in, to the best of their knowledge.

Tier 1 Annual Recurring Costs			
Specify number of licenses and any additional requirements to qualify for Tier 1 Pricing:			
Item	Examples of Included Items	Unit Cost <i>(Indicate Flat Cost or Per Student, Staff, User, etc.)</i>	Estimated Total Cost <i>(Years 1-5)</i>
Solution	<i>Including but not limited to: Software, Licensing, training materials and release notes.</i>		Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Maintenance and Support			Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Upgrade & Update Costs	<i>Including but not limited to: Updated training materials and release notes.</i>		Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Other	<i>Please Describe:</i>		Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Total Annual Recurring Costs			Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:

Tier 2 Annual Recurring Costs			
Specify number of licenses and any additional requirements to qualify for Tier 2 Pricing:			
Item	Examples of Included Items	Unit Cost (Indicate Flat Cost or Per Student, Staff, User, etc.)	Estimated Total Cost (Years 1-5)
Solution	<i>Including but not limited to: Software, Licensing, training materials and release notes.</i>		Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Maintenance and Support			Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Upgrade & Update Costs	<i>Including but not limited to: Updated training materials and release notes.</i>		Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Other	<i>Please Describe:</i>		Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:
Total Annual Recurring Costs			Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL:



Optional Services and Costs: Expand the following table as required to provide pricing for the proposed Solution to meet the requirements specified in this RFP. All costs for functionality in the proposal must be listed in the Optional Services/Solutions if not identified in the previous pricing forms. Costs not identified by the Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.

Optional Services/Solutions and Costs				
Item	Description <i>(Check box if required to meet minimum requirements of this RFP)</i>	Dependent Requirements <i>(If required to meet requirements in this RFP, list requirements that are dependent on the Optional Services/Costs OR Future development efforts)</i>	Unit Cost <i>(Indicate Flat Cost or Per Student, Staff, User, etc.)</i>	Estimated Total Cost <i>(Years 1-5)</i>
	<input type="checkbox"/> Required to Meet Requirements		____ Recurring ____ One-Time	Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL: ____ Recurring ____ One-Time
	<input type="checkbox"/> Required to Meet Requirements		____ Recurring ____ One-Time	Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL: ____ Recurring ____ One-Time
	<input type="checkbox"/> Required to Meet Requirements		____ Recurring ____ One-Time	Year 1: Year 2: Year 3: Year 4: <u>Year 5:</u> TOTAL: ____ Recurring ____ One-Time

Appendix D: Supplementary Materials

Service Level and Maintenance Agreement (if applicable)

Sample Reports and Training Materials

Additional Resources that Support the Proposal



Appendix E: Standard Student Data Privacy Agreement (CA-NDPA Standard)

Please complete and sign the CA-NDPA, including Exhibit E, so Ed Tech JPA Members can agree to the same terms.

Version 1.0 (10.22.20)

Ed Tech JPA

and

Provider



This Student Data Privacy Agreement ("DPA") is entered into on _____ (the "Effective Date") and is entered into by and between: Education Technology Joint Powers Authority

(the "**Local Education Agency**" or "**LEA**"), located at 5050 Barranca Parkway, Irvine, CA 92604, and

(the "**Provider**"),

located at

WHEREAS, the Provider is providing educational or digital services to LEA.

WHEREAS, the Provider and LEA recognize the need to protect personally identifiable student information and other regulated data exchanged between them as required by applicable laws and regulations, such as the Family Educational Rights and Privacy Act ("**FERPA**") at 20 U.S.C. § 1232g (34 CFR Part 99); the Children's Online Privacy Protection Act ("**COPPA**") at 15 U.S.C. § 6501-6506 (16 CFR Part 312), applicable state privacy laws and regulations and

WHEREAS, the Provider and LEA desire to enter into this DPA for the purpose of establishing their respective obligations and duties in order to comply with applicable laws and regulations.

NOW THEREFORE, for good and valuable consideration, LEA and Provider agree as follows:

1. A description of the Services to be provided, the categories of Student Data that may be provided by LEA to Provider, and other information specific to this DPA are contained in the Standard Clauses hereto.
2. **Special Provisions. Check if Required**

If checked, the Supplemental State Terms and attached hereto as **Exhibit "G"** are hereby incorporated by reference into this DPA in their entirety.

If Checked, the Provider, has signed **Exhibit "E"** to the Standard Clauses, otherwise known as General Offer of Privacy Terms.

3. In the event of a conflict between the SDPC Standard Clauses, the State or Special Provisions will control. In the event there is conflict between the terms of the DPA and any other writing, including, but not limited to the Service Agreement and Provider Terms of Service or Privacy Policy the terms of this DPA shall control.
4. This DPA shall stay in effect for five (5) years. Exhibit E will expire five (5) years from the date the original DPA was signed.
5. The services to be provided by Provider to LEA pursuant to this DPA are detailed in **Exhibit "A"** (the "**Services**").
6. **Notices.** All notices or other communication required or permitted to be given hereunder may be given via e-mail transmission, or first-class mail, sent to the designated representatives below.



The designated representative for the LEA for this DPA is:

Name: Michelle Bennett

Title: Procurement Specialist

Address: 5050 Barranca Parkway, Irvine, CA 92604

Phone: 949-936-5022

Email: edtechjpa@iusd.org

The designated representative for the Provider for this DPA is:

Name:

Title:

Address:

Phone:

Email:

IN WITNESS WHEREOF, LEA and Provider execute this DPA as of the Effective Date.

LEA: Education Technology Joint Powers Authority

By:

Date:

Printed Name: Brianne Ford

Title/Position: President

PROVIDER:

By:

Date:

Printed Name:

Title/Position:

STANDARD CLAUSES

Version 3.0

ARTICLE I: PURPOSE AND SCOPE

1. **Purpose of DPA.** The purpose of this DPA is to describe the duties and responsibilities to protect Student Data including compliance with all applicable federal, state, and local privacy

laws, rules, and regulations, all as may be amended from time to time. In performing these services, the Provider shall be considered a School Official with a legitimate educational interest, and performing services otherwise provided by the LEA. Provider shall be under the direct control and supervision of the LEA, with respect to its use of Student Data

2. **Student Data to Be Provided.** In order to perform the Services described above, LEA shall provide Student Data as identified in the Schedule of Data, attached hereto as **Exhibit "B"**.

3. **DPA Definitions.** The definition of terms used in this DPA is found in **Exhibit "C"**. In the event of a conflict, definitions used in this DPA shall prevail over terms used in any other writing, including, but not limited to the Service Agreement, Terms of Service, Privacy Policies etc.

ARTICLE II: DATA OWNERSHIP AND AUTHORIZED ACCESS

1. **Student Data Property of LEA.** All Student Data transmitted to the Provider pursuant to the Service Agreement is and will continue to be the property of and under the control of the LEA. The Provider further acknowledges and agrees that all copies of such Student Data transmitted to the Provider, including any modifications or additions or any portion thereof from any source, are subject to the provisions of this DPA in the same manner as the original Student Data. The Parties agree that as between them, all rights, including all intellectual property rights in and to Student Data contemplated per the Service Agreement, shall remain the exclusive property of the LEA. For the purposes of FERPA, the Provider shall be considered a School Official, under the control and direction of the LEA as it pertains to the use of Student Data, notwithstanding the above.

2. **Parent Access.** To the extent required by law the LEA shall establish reasonable procedures by which a parent, legal guardian, or eligible student may review Education Records and/or Student Data correct erroneous information, and procedures for the transfer of student-generated content to a personal account, consistent with the functionality of services. Provider shall respond in a reasonably timely manner (and no later than forty-five (45) days from the date of the request or pursuant to the time frame required under state law for an LEA to respond to a parent or student, whichever is sooner) to the LEA's request for Student Data in a student's records held by the Provider to view or correct as necessary. In the event that a parent of a student or other individual contacts the Provider to review any of the Student Data accessed pursuant to the Services, the Provider shall refer the parent or individual to the LEA, who will follow the necessary and proper procedures regarding the requested information.

3. **Separate Account.** If Student-Generated Content is stored or maintained by the Provider, Provider shall, at the request of the LEA, transfer, or provide a mechanism for the LEA to transfer, said Student Generated Content to a separate account created by the student.

4. **Law Enforcement Requests.** Should law enforcement or other government entities ("Requesting Party(ies)") contact Provider with a request for Student Data held by the Provider pursuant to the Services, the Provider shall notify the LEA in advance of a compelled disclosure to the Requesting Party, unless lawfully directed by the Requesting Party not to inform the LEA of the request.

5. **Subprocessors.** Provider shall enter into written agreements with all Subprocessors performing functions for the Provider in order for the Provider to provide the Services pursuant to the Service Agreement, whereby the Subprocessors agree to protect Student Data in a manner no less stringent than the terms of this DPA.

ARTICLE III: DUTIES OF LEA

1. **Provide Data in Compliance with Applicable Laws.** LEA shall provide Student Data for the purposes of obtaining the Services in compliance with all applicable federal, state, and local privacy laws, rules, and regulations, all as may be amended from time to time.

2. **Annual Notification of Rights.** If the LEA has a policy of disclosing Education Records and/or Student Data under FERPA {34 CFR § 99.31{a}{l}}, LEA shall include a specification of criteria for determining who constitutes a School Official and what constitutes a legitimate educational interest in its annual notification of rights.

3. **Reasonable Precautions.** LEA shall take reasonable precautions to secure usernames, passwords, and any other means of gaining access to the services and hosted Student Data.

4. **Unauthorized Access Notification.** LEA shall notify Provider promptly of any known unauthorized access. LEA will assist Provider in any efforts by Provider to investigate and respond to any unauthorized access.

ARTICLE IV: DUTIES OF PROVIDER

1. **Privacy Compliance.** The Provider shall comply with all applicable federal, state, and local laws, rules, and regulations pertaining to Student Data privacy and security, all as may be amended from time to time.

2. **Authorized Use.** The Student Data shared pursuant to the Service Agreement, including persistent unique identifiers, shall be used for no purpose other than the Services outlined in Exhibit A and/or stated in the Service Agreement and/or otherwise authorized under the statutes referred to herein this DPA.

- 3. Provider Employee Obligation.** Provider shall require all of Provider's employees and agents who have access to Student Data to comply with all applicable provisions of this DPA with respect to the Student Data shared under the Service Agreement. Provider agrees to require and maintain an appropriate confidentiality agreement from each employee or agent with access to Student Data pursuant to the Service Agreement.

- 4. No Disclosure.** Provider acknowledges and agrees that it shall not make any re-disclosure of any Student Data or any portion thereof, including without limitation, user content or other non-public information and/or Personally Identifiable Information contained in the Student Data other than as directed or permitted in writing by the LEA or this DPA. This prohibition against disclosure shall not apply to aggregate summaries of De-Identified information, Student Data disclosed pursuant to a lawfully issued subpoena or other legal process, or to Subprocessors performing services on behalf of the Provider pursuant to this DPA. Provider will not Sell Student Data to any third party.

- 5. De-Identified Data:** Provider agrees not to attempt to re-identify de-identified Student Data. De-Identified Data may be used by the Provider for those purposes allowed under FERPA and the following purposes:

 - (1) assisting the LEA or other governmental agencies in conducting research and other studies; and (2) research and development of the Provider's educational sites, services, or applications, and to demonstrate the effectiveness of the Services; and (3) for adaptive learning purpose and for customized student learning. Provider's use of De-Identified Data shall survive termination of this DPA or any request by LEA to return or destroy Student Data. Except for Subprocessors, Provider agrees not to transfer de identified Student Data to any party unless (a) that party agrees in writing not to attempt re-identification, and (b) prior written notice has been given to the LEA who has provided prior written consent for such transfer. Prior to publishing any document that names the LEA explicitly or indirectly, the Provider shall obtain the LEA's written approval of the manner in which de-identified data is presented.

- 6. Disposition of Data.** Upon written request from the LEA, Provider shall dispose of or provide a mechanism for the LEA to transfer Student Data obtained under the Service Agreement, within sixty (60) days of the date of said request and according to a schedule and procedure as the Parties may reasonably agree. Upon termination of this DPA, if no written request from the LEA is received, Provider shall dispose of all Student Data after providing the LEA with reasonable prior notice. The duty to dispose of Student Data shall not extend to Student Data that had been De-Identified or placed in a separate student account pursuant to Article II section 3. The LEA may employ a "Directive for Disposition of Data" form, a copy of which is attached hereto as **Exhibit "D"**. If the LEA and Provider employ Exhibit "D," no further written request or notice is required on the part of either party prior to the disposition of Student Data described in Exhibit "D".

- 7. Advertising Limitations.** Provider is prohibited from using, disclosing, or selling Student Data to (a) inform, influence, or enable Targeted Advertising; or (b) develop a profile of a student, family member/guardian or group, for any purpose other than providing the Service to LEA. This section does not prohibit Provider from using Student Data (i) for adaptive learning or customized student learning (including generating personalized learning recommendations); or (ii) to make product

recommendations to teachers or LEA employees; or (iii) to notify account holders about new education product updates, features, or services or from otherwise using Student Data as permitted in this DPA and its accompanying exhibits.

ARTICLE V: DATA PROVISIONS

1. **Data Storage.** Where required by applicable law, Student Data shall be stored within the United States. Upon request of the LEA, Provider will provide a list of the locations where Student Data is stored.
2. **Audits.** No more than once a year, or following unauthorized access, upon receipt of a written request from the LEA with at least ten (10) business days' notice and upon the execution of an appropriate confidentiality agreement, the Provider will allow the LEA to audit the security and privacy measures that are in place to ensure protection of Student Data or any portion thereof as it pertains to the delivery of services to the LEA. The Provider will cooperate reasonably with the LEA and any local, state, or federal agency with oversight authority or jurisdiction in connection with any audit or investigation of the Provider and/or delivery of Services to students and/or LEA, and shall provide reasonable access to the Provider's facilities, staff, agents and LEA's Student Data and all records pertaining to the Provider, LEA and delivery of Services to the LEA. Failure to reasonably cooperate shall be deemed a material breach of the DPA.
3. **Data Security.** The Provider agrees to utilize administrative, physical, and technical safeguards designed to protect Student Data from unauthorized access, disclosure, acquisition, destruction, use, or modification. The Provider shall adhere to any applicable law relating to data security. The Provider shall implement an adequate Cybersecurity Framework based on one of the nationally recognized standards set forth set forth in **Exhibit "F"**. Exclusions, variations, or exemptions to the identified Cybersecurity Framework must be detailed in an attachment to **Exhibit "F"**. Additionally, Provider may choose to further detail its security programs and measures that augment or are in addition to the Cybersecurity Framework in **Exhibit "F"**. Provider shall provide, in the Standard Schedule to the DPA, contact information of an employee who LEA may contact if there are any data security concerns or questions.
4. **Data Breach.** In the event of an unauthorized release, disclosure or acquisition of Student Data that compromises the security, confidentiality or integrity of the Student Data maintained by the Provider the Provider shall provide notification to LEA within seventy-two (72) hours of confirmation of the incident, unless notification within this time limit would disrupt investigation of the incident by law enforcement. In such an event, notification shall be made within a reasonable time after the incident. Provider shall follow the following process:
 - (1) The security breach notification described above shall include, at a minimum, the following information to the extent known by the Provider and as it becomes available:

- i. The name and contact information of the reporting LEA subject to this section.
 - ii. A list of the types of personal information that were or are reasonably believed to have been the subject of a breach.
 - iii. If the information is possible to determine at the time the notice is provided, then either (1) the date of the breach, (2) the estimated date of the breach, or (3) the date range within which the breach occurred. The notification shall also include the date of the notice.
 - iv. Whether the notification was delayed as a result of a law enforcement investigation, if that information is possible to determine at the time the notice is provided; and
 - v. A general description of the breach incident, if that information is possible to determine at the time the notice is provided.
- (2) Provider agrees to adhere to all federal and state requirements with respect to a data breach related to the Student Data, including, when appropriate or required, the required responsibilities and procedures for notification and mitigation of any such data breach.
- (3) Provider further acknowledges and agrees to have a written incident response plan that reflects best practices and is consistent with industry standards and federal and state law for responding to a data breach, breach of security, privacy incident or unauthorized acquisition or use of Student Data or any portion thereof, including Personally Identifiable Information and agrees to provide LEA, upon request, with a summary of said written incident response plan.
- (4) LEA shall provide notice and facts surrounding the breach to the affected students, parents or guardians.
- (5) In the event of a breach originating from LEA's use of the Service, Provider shall cooperate with LEA to the extent necessary to expeditiously secure Student Data.

ARTICLE VI: GENERAL OFFER OF TERMS

Provider may, by signing the attached form of "General Offer of Privacy Terms" (General Offer, attached hereto as **Exhibit "E"**, be bound by the terms of **Exhibit "E"** to any other LEA who signs the acceptance on said Exhibit. The form is limited by the terms and conditions described therein.

ARTICLE VII: MISCELLANEOUS

1. **Termination.** In the event that either Party seeks to terminate this DPA, they may do so by mutual written consent so long as the Service Agreement has lapsed or has been terminated. Either

party may terminate this DPA and any service agreement or contract if the other party breaches any terms of this DPA.

2. **Effect of Termination Survival.** If the Service Agreement is terminated, the Provider shall destroy all of LEA's Student Data pursuant to Article IV, section 6.

3. **Priority of Agreements.** This DPA shall govern the treatment of Student Data in order to comply with the privacy protections, including those found in FERPA and all applicable privacy statutes identified in this DPA. In the event there is conflict between the terms of the DPA and the Service Agreement, Terms of Service, Privacy Policies, or with any other bid/RFP, license agreement, or writing, the terms of this DPA shall apply and take precedence. In the event of a conflict between Exhibit H, the SDPC Standard Clauses, and/or the Supplemental State Terms, Exhibit H will control, followed by the Supplemental State Terms. Except as described in this paragraph herein, all other provisions of the Service Agreement shall remain in effect.

4. **Entire Agreement.** This DPA and the Service Agreement constitute the entire agreement of the Parties relating to the subject matter hereof and supersedes all prior communications, representations, or agreements, oral or written, by the Parties relating thereto. This DPA may be amended and the observance of any provision of this DPA may be waived (either generally or in any particular instance and either retroactively or prospectively) only with the signed written consent of both Parties. Neither failure nor delay on the part of any Party in exercising any right, power, or privilege hereunder shall operate as a waiver of such right, nor shall any single or partial exercise of any such right, power, or privilege preclude any further exercise thereof or the exercise of any other right, power, or privilege.

5. **Severability.** Any provision of this DPA that is prohibited or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such prohibition or unenforceability without invalidating the remaining provisions of this DPA, and any such prohibition or unenforceability in any jurisdiction shall not invalidate or render unenforceable such provision in any other jurisdiction. Notwithstanding the foregoing, if such provision could be more narrowly drawn so as not to be prohibited or unenforceable in such jurisdiction while, at the same time, maintaining the intent of the Parties, it shall, as to such jurisdiction, be so narrowly drawn without invalidating the remaining provisions of this DPA or affecting the validity or enforceability of such provision in any other jurisdiction.

6. **Governing Law; Venue and Jurisdiction.** THIS DPA WILL BE GOVERNED BY AND CONSTRUED IN ACCORDANCE WITH THE LAWS OF THE STATE OF THE LEA, WITHOUT REGARD TO CONFLICTS OF LAW PRINCIPLES. EACH PARTY CONSENTS AND SUBMITS TO THE SOLE AND EXCLUSIVE JURISDICTION TO THE STATE AND FEDERAL COURTS FOR THE COUNTY OF THE LEA FOR ANY DISPUTE ARISING OUT OF OR RELATING TO THIS DPA OR THE TRANSACTIONS CONTEMPLATED HEREBY.

7. **Successors Bound.** This DPA is and shall be binding upon the respective successors in interest to Provider in the event of a merger, acquisition, consolidation or other business reorganization or sale of all or substantially all of the assets of such business. In the event that the Provider sells, merges, or otherwise disposes of its business to a successor during the term of this DPA, the Provider shall provide written notice to the LEA no later than sixty (60) days after the closing date of sale, merger, or disposal. Such notice shall include a written, signed assurance that the successor will assume the obligations of the DPA and any obligations with respect to Student Data within the Service Agreement. The LEA has the authority to terminate the DPA if it disapproves of the successor to whom the Provider is selling, merging, or otherwise disposing of its business.

8. **Authority.** Each party represents that it is authorized to bind to the terms of this DPA, including confidentiality and destruction of Student Data and any portion thereof contained therein, all related or associated institutions, individuals, employees or contractors who may have access to the Student Data and/or any portion thereof.

9. **Waiver.** No delay or omission by either party to exercise any right hereunder shall be construed as a waiver of any such right and both parties reserve the right to exercise any such right from time to time, as often as may be deemed expedient.

EXHIBIT "A"

DESCRIPTION OF SERVICES

[INSERT DETAILED DESCRIPTION OF PRODUCTS AND SERVICES HERE.

IF MORE THAN ONE PRODUCT (RESOURCE) OR SERVICE IS INCLUDED, LIST EACH PRODUCT
(RESOURCE) HERE]

EXHIBIT "B"
SCHEDULE OF DATA

Category of Data	Elements	Check if Used by Your System		
Application Technology Meta Data	IP Addresses of users, Use of cookies, etc.			
	Other application technology meta data- Please specify:			
Application Use Statistics	Meta data on user interaction with application			
Assessment	Standardized test scores			
	Observation data			
	Other assessment data-Please specify:			
Attendance	Student school (daily) attendance data			
	Student class attendance data			
Communications	Online communications captured (emails, blog entries)			
Conduct	Conduct or behavioral data			
Demographics	Date of Birth			
	Place of Birth			
	Gender			

	Ethnicity or race		<input type="checkbox"/>	
	Language information (native, or primary language spoken by student)			
	Other demographic information-Please specify:			
Enrollment	Student school enrollment			
	Student grade level			
	Homeroom			
	Guidance counselor			
	Specific curriculum programs			
	Year of graduation			
	Other enrollment information-Please specify:			
Parent/Guardian Contact Information	Address			
	Email			
	Phone			

Category of Data	Elements	Check if Used by Your System		
Parent/Guardian ID	Parent ID number (created to link parents to students)			
Parent / Guardian Name	First and/or Last			
Schedule	Student scheduled courses			
	Teacher names			
Special Indicator	English language learner information			
	Low income status			
	Medical alerts/ health data			
	Student disability information		<input type="checkbox"/>	
	Specialized education services (IEP or 504)			
	Living situations (homeless/foster care)			
	Other indicator information-Please specify:			
Student Contact Information	Address			
	Email			
	Phone			

Student Identifiers	Local (School district) ID number			
	State ID number			
	Provider/App assigned student ID number			
	Student app username			
	Student app passwords			
Student Name	First and/or Last			
Student In App Performance	Program/application performance (typing program-student types 60 wpm, reading program-student reads below grade level)			
Student Program Membership	Academic or extracurricular activities a student may belong to or participate in			
Student Survey Responses	Student responses to surveys or questionnaires			
Student work	Student generated content; writing, pictures, etc.			
	Other student work data -Please specify:			
Transcript	Student course grades			
	Student course data			
	Student course grades/ performance scores			

Category of Data	Elements	Check if Used By Your System		
	Other transcript data - Please specify:			
Transportation	Student bus assignment			
	Student pick up and/or drop off location			
	Student bus card ID number			
	Other transportation data - Please specify:			
Other	Please list each additional data element used, stored, or collected by your application:			
None	No Student Data collected at this time. Provider will immediately notify LEA if this designation is no longer applicable .			

EXHIBIT "C:" DEFINITIONS

De-Identified Data and De-Identification: Records and information are considered to be de-identified when all Personally Identifiable Information has been removed or obscured, such that the remaining information does not reasonably identify a specific individual, including, but not limited to, any information that, alone or in combination is linkable to a specific student and provided that the educational agency, or other party, has made a reasonable determination that a student's identity is not personally identifiable, taking into account reasonable available information.

Educational Records: Educational Records are records, files, documents, and other materials directly related to a student and maintained by the school or local education agency, or by a person acting for such school or local education agency, including but not limited to, records encompassing all the material kept in the student's cumulative folder, such as general identifying data, records of attendance and of academic work completed, records of achievement, and results of evaluative tests, health data, disciplinary status, test protocols and individualized education programs.

Metadata: means information that provides meaning and context to other data being collected; including, but not limited to: date and time records and purpose of creation Metadata that have been stripped of all direct and indirect identifiers are not considered Personally Identifiable Information.

Operator: means the operator of an internet website, online service, online application, or mobile application with actual knowledge that the site, service, or application is used for K-12 school purposes. Any entity that operates an internet website, online service, online application, or mobile application that has entered into a signed, written agreement with an LEA to provide a service to that LEA shall be considered an "operator" for the purposes of this section.

Originating LEA: A local education agency who originally executes the DPA in its entirety with the Provider.

Provider: For purposes of the DPA, the term "Provider" means provider of digital educational software or services, including cloud-based services, for the digital storage, management, and retrieval of Student Data. Within the DPA the term "Provider" includes the term "Third Party" and the term "Operator" as used in applicable state statutes.

Student Generated Content: The term "student-generated content" means materials or content created by a student in the services including, but not limited to, essays, research reports, portfolios, creative writing, music or other audio files, photographs, videos, and account information that enables ongoing ownership of student content.

School Official: For the purposes of this DPA and pursuant to 34 CFR § 99.31(b), a School Official is a contractor that: (1) Performs an institutional service or function for which the agency or institution would otherwise use employees; (2) Is under the direct control of the agency or institution with respect to the use and maintenance of Student Data including Education Records; and (3) Is subject to 34 CFR § 99.33(a) governing the use and re disclosure of Personally Identifiable Information from Education Records.

Service Agreement: Refers to the Contract and/or Terms of Service and/or Terms of Use.

Student Data: Student Data includes any data, whether gathered by Provider or provided by LEA or its users, students, or students' parents/guardians, that is descriptive of the student including, but not limited to,

information in the student's educational record or email, first and last name, birthdate, home or other physical address, telephone number, email address, or other information allowing physical or online contact, discipline records, videos, test results, special education data, juvenile dependency records, grades, evaluations, criminal records, medical records, health records, social security numbers, biometric information, disabilities, socioeconomic information, individual purchasing behavior or preferences, food purchases, political affiliations, religious information, text messages, documents, student identifiers, search activity, photos, voice recordings, geolocation information, parents' names, or any other information or identification number that would provide information about a specific student. Student Data includes Meta Data. Student Data further includes "Personally Identifiable Information (PII)," as defined in 34 C.F.R. § 99.3 and as defined under any applicable state law. Student Data shall constitute Education Records for the purposes of this DPA, and for the purposes of federal, state, and local laws and regulations. Student Data as specified in **Exhibit "B"** is confirmed to be collected or processed by the Provider pursuant to the Services. Student Data shall not constitute that information that has been anonymized or de-identified, or anonymous usage data regarding a student's use of Provider's services.

Subprocessor: For the purposes of this DPA, the term "Subprocessor" (sometimes referred to as the "Subcontractor") means a party other than LEA or Provider, who Provider uses for data collection, analytics, storage, or other service to operate and/or improve its service, and who has access to Student Data.

Subscribing LEA: An LEA that was not party to the original Service Agreement and who accepts the Provider's General Offer of Privacy Terms.

Targeted Advertising: means presenting an advertisement to a student where the selection of the advertisement is based on Student Data or inferred over time from the usage of the operator's Internet web site, online service or mobile application by such student or the retention of such student's online activities or requests over time for the purpose of targeting subsequent advertisements. "Targeted Advertising" does not include any advertising to a student on an internet web site based on the content of the web page or in response to a student's response or request for information or feedback.

Third Party: The term "Third Party" means a provider of digital educational software or services, including cloud based services, for the digital storage, management, and retrieval of Education Records and/or Student Data, as that term is used in some state statutes. However, for the purpose of this DPA, the term "Third Party" when used to indicate the provider of digital educational software or services is replaced by the term "Provider."

EXHIBIT "D" DIRECTIVE FOR DISPOSITION OF DATA

Provider to dispose of data obtained by Provider pursuant to the terms of the Service Agreement between LEA and Provider. The terms of the Disposition are set forth below:

1. Extent of Disposition

Disposition is partial. The categories of data to be disposed of are set forth below or are found in

an attachment to this Directive:

[Insert categories of data here]

Disposition is Complete. Disposition extends to all categories of data.

2. Nature of disposition

Disposition shall be by destruction or deletion of data.

Disposition shall be by a transfer of data. The data shall be transferred to the following site as follows:

[Insert or attach special instructions]

3. Schedule of Disposition

Data shall be disposed of by the following date:

As soon as commercially practicable. By

4. Signature

Authorized Representative of LEA

Date

5. Verification of Disposition of Data

Authorized Representative of Company

Date

EXHIBIT "E" GENERAL OFFER OF PRIVACY TERMS

1. Offer of Terms

Provider offers the same privacy protections found in this DPA between it and Education Technology joint Powers Authority ("Originating LEA") which is dated _____, to any other LEA ("Subscribing LEA") who accepts this General Offer of Privacy Terms ("General Offer") through its signature below. This General Offer shall extend only to privacy protections, and Provider's signature shall not necessarily bind Provider to other terms, such as price, term, or schedule of services, or to any other provision not addressed in this DPA. The Provider and the Subscribing LEA may also agree to change the data provided by Subscribing LEA to the Provider to suit the unique needs of the Subscribing LEA. The Provider may withdraw the General Offer in the event of: (1) a material change in the applicable privacy statutes; (2) a material change in the services and products listed in the originating Service Agreement; or five (5) years after the date of Provider's signature to this Form. Subscribing LEAs should send the signed **Exhibit "E"** to Provider at the following email address:

PROVIDER:

By: _____ Date: _____
Printed Name: _____ Title/Position: _____

2. Subscribing LEA

A Subscribing LEA, by signing a separate Service Agreement with Provider, and by its signature below, accepts the General Offer of Privacy Terms. The Subscribing LEA and the Provider shall therefore be bound by the same terms of this DPA for the term of the DPA between the _____ and the Provider. ****PRIOR TO ITS EFFECTIVENESS, SUBSCRIBING LEA MUST DELIVER NOTICE OF ACCEPTANCE TO PROVIDER PURSUANT TO ARTICLE VI, SECTION 5. ****

LEA:

BY: _____ Date: _____
Printed Name: _____ Title/Position: _____
SCHOOL DISTRICT NAME: _____
DESIGNATED REPRESENTATIVE OF LEA:
Name: _____ Title: _____
Address: _____ Telephone Number: _____
Email: _____

EXHIBIT "F" DATA SECURITY REQUIREMENTS

Adequate Cybersecurity Frameworks

2/24/2020

The Education Security and Privacy Exchange ("Edspex") works in partnership with the Student Data Privacy Consortium and industry leaders to maintain a list of known and credible cybersecurity frameworks which can protect digital learning ecosystems chosen based on a set of guiding cybersecurity principles* ("Cybersecurity Frameworks") that may be utilized by Provider.

Cybersecurity Frameworks

	MAINTAINING ORGANIZATION/GROUP	FRAMEWORK(S)
<input type="checkbox"/>	National Institute of Standards and Technology	NIST Cybersecurity Framework Version 1.1
<input type="checkbox"/>	National Institute of Standards and Technology	NIST SP 800-53, Cybersecurity Framework for Improving Critical Infrastructure Cybersecurity (CSF), Special Publication 800-171
<input type="checkbox"/>	International Standards Organization	Information technology - Security techniques - Information security management systems (ISO 27000 series)
<input type="checkbox"/>	Secure Controls Framework Council, LLC	Security Controls Framework (SCF)
<input type="checkbox"/>	Center for Internet Security	CIS Critical Security Controls (CSC, CIS Top 20)

	Office of the Under Secretary of Defense for Acquisition and Sustainment (OUSD(A&S))	Cybersecurity Maturity Model Certification (CMMC, ~FAR/DFAR)
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Please visit [http:// www.eds pex.org](http://www.eds.pex.org) for further details about the noted frameworks.

*Cybersecurity Principles used to choose the Cybersecurity Frameworks are located here

EXHIBIT "G" Supplemental SDPC State Terms for California

Version 1.0

This Amendment for SDPC State Terms for California ("**Amendment**") is entered into on the date of full execution (the "**Effective Date**") and is incorporated into and made a part of the Student Data Privacy Agreement ("**DPA**") by and between: Education Technology Joint Powers Authority, located at 5050 Barranca Parkway, Irvine, CA 92604 (the "**Local Education Agency**" or "**LEA**") and

, located at

(the "**Provider**").

All capitalized terms not otherwise defined herein shall have the meaning set forth in the DPA.

WHEREAS, the Provider is providing educational or digital services to LEA, which services include: (a) cloud-based services for the digital storage, management, and retrieval of pupil records; and/or (b) digital educational software that authorizes Provider to access, store, and use pupil records; and

WHEREAS, the Provider and LEA recognize the need to protect personally identifiable student information and other regulated data exchanged between them as required by applicable laws and regulations, such as the Family Educational Rights and Privacy Act ("**FERPA**") at 20 U.S.C. § 1232g (34 C.F.R. Part 99); the Protection of Pupil Rights Amendment ("**PPRA**") at 20 U.S.C. §1232h; and the Children's Online Privacy Protection Act ("**COPPA**") at 15 U.S.C. § 6501-6506 (16 C.F.R. Part 312), accordingly, the Provider and LEA have executed the DPA, which establishes their respective obligations and duties in order to comply with such applicable laws; and

WHEREAS, the Provider will provide the services to LEA within the State of California and the Parties recognizes the need to protect personally identifiable student information and other regulated data exchanged between them as required by applicable California laws and regulations, such as the Student Online Personal Information Protection Act ("**SOPIPA**") at California Bus. & Prof. Code § 22584; California Assembly Bill 1584 ("**AB 1584**") at California Education Code section 49073.1; and other applicable state privacy laws and regulations; and

WHEREAS, the Provider and LEA desire to enter into this Amendment for the purpose of clarifying their respective obligations and duties in order to comply with applicable California state laws and regulations.

NOW, THEREFORE, for good and valuable consideration, LEA and Provider agree as follows:

Term. The term of this Amendment shall expire on the same date as the DPA, unless otherwise terminated by the Parties.

Modification to Article IV, Section 7 of the DPA. Article IV, Section 7 of the DPA (Advertising Limitations) is amended by deleting the stricken text as follows:

Provider is prohibited from using, disclosing, or selling Student Data to (a) inform, influence, or enable Targeted Advertising; or (b) develop a profile of a student, family member/guardian or group, for any purpose other than providing the Service to LEA. This section does not prohibit Provider from using Student Data ~~(i) for adaptive learning or customized student learning (including generating personalized learning recommendations); or (ii) to make product recommendations to teachers or LEA employees; or (iii) to notify account holders about new~~



~~education product updates, features, or services or from otherwise using Student Data as permitted in this DPA and its accompanying exhibits.~~

IN WITNESS WHEREOF, LEA and Provider execute this Amendment as of the Effective Date.

LEA: Education Technology Joint Powers Authority

By:

Date:

Printed Name: Brianne Ford

Title/Position: President

PROVIDER:

By:

Date:

Printed Name:

Title/Position:

Attachment 1: Proposal Form

Contractor Information

Firm/Contractor Name	
Primary Contact Name	
Contact Title	
Contact Email	
Contact Phone	

Write out all answers using the Proposal Form. Additional material may be submitted with the proposal as appendices. No brochures, marketing materials, or internal company documentation will be considered when scoring Proposals. Cross-references to the Proposal Form in additional materials will not be considered responsive. Any additional descriptive material that is used in support of any information in your proposal must be clearly identified. Essential criteria is denoted with double asterisks (**), and green boxes. Each vendor must meet the essential criteria to be awarded a contract with Ed Tech JPA. Criteria without double asterisks in blue boxes are supplemental criteria our members may use to determine the products and services that best meet their needs.

Part 1 Vendor Support and Ability to Perform

Please respond to each requirement directly and provide additional documentation as needed to support the Proposal.

1.1 Vendor Background/Qualifications:	
Instructions/Overview: Provide a brief description of Vendor's firm(s), as well as any other firms joining with Vendor to provide services.	
History of the firm(s)	
Age of the firm(s)	
Number of employees	
Organizational structure of the firm(s)	
Length of time in the industry	
Number of office locations	
Addresses of all offices	

1.2 Vendor Contact(s)	
Instructions/Overview: Provide a list of company contacts. For each provide: name, description of role, detailed experience information and/or resume.	
Contract/sales contact	
Product manager(s)	
Other (specify)	

	Yes	No	Comments
1.3 Confirm that Vendor will meet the minimum insurance requirements specified in Appendix B. List any insurance requirements Vendor will request a waiver for, if chosen as the Selected Vendor. If the Selected Vendor fails to maintain the required insurance coverages, without a waiver approved by Ed Tech JPA and/or Participant staff, Ed Tech JPA and/or Participant may declare Vendor in breach of the Master Agreement and/or Purchase Agreement. **			
1.4 Confirm that Vendor maintains cyber insurance.			
1.5 Confirm that Vendor will acquire and adhere to any permits, fees, inspections, and construction administrative requirements. Confirm that a copy of all applicable permit applications and, upon issuance, all approved permit(s) shall be provided to the Participant. **			
1.6 Vendor acknowledges and agrees to all specifications listed in Sections 1 - 6 of this RFP. **			
1.7 Vendor certifies that it complies with the Civil Rights Act of 1964, and all applicable Federal and State laws and regulations relating to equal employment opportunity.			

****1.8**** Provide a brief overview of Vendor’s technical experience, qualifications, and background in providing and maintaining a human resources and/or substitute management platform and related services for similarly sized K-12 education and/or government customers. Indicate the prior experience of Vendor that is relevant to this contract. Include sufficient detail to demonstrate the relevance of such experience. Please provide specific examples of recently completed K-12 or government projects similar in size, scope and timeline to this project. Proposal should evidence Vendor’s awareness of and support for the unique needs of education clients. **

1.9 Provide evidence of long-term fiscal stability. Artifacts may include fiscal reports or recent audit results that demonstrate consistent and current financial security. Financial information submitted in response to Section 1.8 will be considered proprietary information.

1.10 Make a written commitment to make available trained personnel, and software support to fully maintain the Solution for a minimum period of five years from the date of implementation.

1.11 Subcontractors

1.11.1 Subcontractors Information: Any subcontractors performing services against this agreement must be fully listed and detailed in the proposal submitted by Vendor. State any work proposed to be provided by a subcontractor, and provide evidence of each subcontractor’s capability and willingness to carry out the work. For each proposed subcontractor, include:

Firm Name	
Address	
Management contact person	
Complete description of work to be subcontracted	

Descriptive information concerning subcontractor's organization and abilities.	
--	--

	Yes	No	Comments
1.11.2 Vendor agrees to bind every subcontractor by the terms and conditions of this RFP, Vendor Proposal and all resulting agreements, including licensing and experience qualifications, as far as such terms and conditions are applicable to the subcontractor(s) work. If Vendor subcontracts any part of this agreement/contract, Vendor shall be fully responsible to the Participant for acts and omissions of its subcontractor and of persons either directly or indirectly employed by Vendor. Nothing contained in these contract documents shall create any contractual relation between any subcontractor and Ed Tech JPA or between any subcontractor and the Participant. **			

1.12 References

	Yes	No	Comments
1.12.1 Confirm that Solution is in operational use, actively supported by Vendor in at least five (5) K-12 or government organizations. **			

Provide customer references for at least five (5) K-12, postsecondary education, or government organizations currently serviced by the Vendor. Include the size of each reference organization and the scope of the project. At least three (3) of the references must be using the proposed products. Installations should be similar in scope, timeline and technical design to Vendor's Proposal for Ed Tech JPA. Vendors who are not located in the United States, but who are located in a country where the GDPR governs and/or who do not perform their proposed Solutions in the United States, but whose performance is in a country where the GDPR governs (Foreign Vendors), must include at least three (3) references located within the United States that use the Solution. Each reference must include the following information:

- **Organization/Customer Name.**
- **Name, Title, and Contact Information** of an organization contact who has ongoing involvement in the Solution and is knowledgeable about the implementation.

- **Organization/Customer Size** - Indicate the number of employees, students, licenses, and stations. Indicate any additional information that may be useful in determining the size of the organization/customer.
- **Implementation Length** - Length of time from contract execution to full implementation for the referenced project.
- **Installation date** of the system.
- **Description of in-use system** – please include details, including but not limited to, which products are currently in use by reference. Please note if the system installed is comparative to the system proposed for Ed Tech JPA. (References must be from organizations using the same or similar products and services).
- **Vendor Project Manager(s)** for implementation and ongoing use of products and services.

Reference #1	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Organization/Customer Size - Number of employees/students/licenses	
Implementation length - from contract execution to full implementation	
Installation Date	
Description of system *include number of locations	
Vendor Project manager	

Reference #2	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Organization/Customer Size - Number of employees/students/licenses	

Implementation length - from contract execution to full implementation	
Installation Date	
Description of system *include number of locations	
Vendor Project manager	

Reference #3	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Organization/Customer Size - Number of employees/students/licenses	
Implementation length - from contract execution to full implementation	
Installation Date	
Description of system *include number of locations	
Vendor Project manager	

Reference #4	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Organization/Customer Size - Number of employees/students/licenses	
Implementation length - from contract execution to full implementation	

Installation Date	
Description of system *include number of locations	
Vendor Project manager	

Reference #5	
Organization/Customer Name	
Name, Title & Contact information for company contact	
Organization/Customer Size - Number of employees/students/licenses	
Implementation length - from contract execution to full implementation	
Installation Date	
Description of system *include number of locations	
Vendor Project manager	

1.13 Implementation

	Yes	No	Comments
1.13.1 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. **			
1.13.2 Vendor confirms that it will provide Participants with a written implementation plans with specific dates no later than two weeks after receiving notification from Participants unless a later date is			

<p>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. **</p>			
<p>1.13.3 Confirm that Vendor will provide maintenance services, and will not outsource maintenance.</p>			
<p>**1.13.4** Vendor confirms that its delivery and maintenance employees shall wear distinctive company clothing and display company/employee identification, including the employee photograph and name. Vendor agrees that all Vendor employees who will be on site will adhere to applicable laws and Participants' background check and supervision requirements. All Vendor employees must check in at the administration office of each site prior to any delivery or site work. **</p>			
<p>1.13.5 If selected, Vendor will agree to contract language allowing mutual contract termination in whole or in part, in the event that Participant(s) does not allocate funding for the continuation of this contract or any portion thereof. In the event of termination due to non-allocation of funds, both parties shall be held without fault and there shall be no financial consequences assessed as a penalty on either party.</p>			

<p>1.13.6 Specify any minimum system requirements or conditions that must be in place prior to implementation.</p>

<p>**1.13.7** 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. **</p>

****1.13.8**** Describe Vendor's proposed project approach, including the roles and responsibilities of project team members, required tasks and any necessary onsite work. Include a detailed list of Participant and Vendor responsibilities during the implementation process. ******

1.13.9 Identify examples of Vendor resources/staff that will be assigned to Participants' implementations, including estimated availability and anticipated time commitment, years of experience with the company, and recent projects similar in scope to Participant implementation.

****1.13.10**** Describe any assumptions or constraints impacting Vendor's project timeline. If any feature or component of the Solution will be phased in on a later timeline (e.g., historical data importing), identify those constraints here. ******

1.13.11 Explain any penalty or liability charge for order changes prior to and after installation of the proposed Solution.

1.13.12 Vendor confirms that should the awarded Vendor be a new vendor, the Vendor shall coordinate with the previous vendor for implementation of the new Solution. Describe Vendor approach and services supporting customer transitions from incumbent human resources and substitute management systems to ensure minimal interruption.

1.13.13 Confirm that the Solution can transfer **personnel and assignment data** (e.g., demographics, job and salary details) from the Participants' system(s) to the new Solution. If this is limited to specific providers/systems please list those with which this capability exists. Provide information related to the Vendor's transition approach. List any assumptions, conditions or limitations that would impact data migration to the Solution from an incumbent system.

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1.13.14 Confirm that the Solution can transfer historical **employee absence and substitute assignment data** from the Participants’ system(s) to the new Solution. If this is limited to specific providers/systems please list those with which this capability exists. Provide information related to the Vendor’s transition approach. List any assumptions, conditions or limitations that would impact data migration to the Solution from an incumbent system.

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1.14 Training

	Yes	No	Comments
1.14.1 Confirm that, if selected, Vendor will provide electronic, editable copies of training materials as well as suggestions for use and best practices as part of the training process.			

****1.14.2**** Provide an overview of the recommended implementation training approach. Describe whether Vendor approaches training through a train-the-trainer approach, turn-key implementation, or other strategy. Be specific about the number of staff that will be directly trained by Vendor personnel under the proposal. Define whether training will be conducted in person, remotely (synchronous) or via on-demand tools. Provide an outline of the proposed training content and sample supporting materials. **

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****1.14.3**** Include a detailed explanation of the training Vendor will provide for site leads/management, Human Resources, payroll, fiscal services and system administrators. Please indicate on which functions the system administrator will be trained. **

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1.14.4 Include the recommended training approach and associated costs for all users. Provide cost options for direct, Vendor-led training for end-users, train-the-trainer and on-demand/self-paced (video or document tutorials) alternatives.

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1.14.5 Describe additional system administration and technical training that is available. Please include the projected costs for the training classes, where they are held, who provides them and if and what certifications would be provided if Participant staff completes various levels.

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1.14.6 Describe any on-site training/support/assistance during or after implementation, and any costs associated with the training/support/assistance.

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1.14.7 Describe online or other on-demand/self-paced (video or document tutorials) training available at any time during the contract for all Participant users (Ex: a new substitute is hired and can access on-demand training at their leisure).

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1.14.8 Describe available webinars and online training.

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1.15 Support and Maintenance

	Yes	No	Comments
1.15.1 Confirm that unlimited support is available through a toll-free phone number and online ticketing system minimally from 6am to 4pm PST (Monday-Friday). **			
1.15.2 Confirm emergency after-business-hours support is available for critical issues (site/district outage, data integration failure). **			
1.15.3 Confirm that, if selected, Vendor will provide full-time, company-employed customer service professionals who are trained specifically to support the products and configuration recommended for			

Participant. Please describe the size, work location and organizational structure of the support team. **			
1.15.4 Confirm that Vendor does not outsource customer support.			
1.15.5 Confirm that Vendor will appoint one point-of-contact for each Participant. to act as a company liaison and point of escalation for support and/or platform issues.			

****1.15.6**** Describe standard support hours (24x7x365 preferred). Describe extended and/or emergency support hours. If standard support is not available 24x7x365, describe criteria used and/or limitations on the availability of emergency or escalated support requests.**

1.15.7 Provide response and resolution times to tickets/reported incidents. Include the severity/type of incident, the average response and resolution time for similar incidents over the past two years and the target and guaranteed response and resolution times included in Vendor's proposal.

1.15.8 Provide data to show the number of support requests, median response time, and customer satisfaction metrics used to evaluate the responsiveness and effectiveness of Vendor's support team.

****1.15.9**** Describe the process for submitting support requests. Explain how support requests are tracked. Describe how the original requestor as well as centralized Participant support personnel (IT contact and contract administrator) can access support request history.

****1.15.10**** Describe the escalation procedures for issues. Please be specific about when and how an issue may be escalated including options such as:

- Automated triggers based on issue severity,

- Automated triggers based on time-lag to resolution,
- Direct request from the Participant (customer),
- Direct request from Vendor staff (e.g, customer success manager), and/or
- Other event or request.

1.15.11 Describe the process for submission, review, escalation and development for new feature requests.

1.15.12 Describe systems in place to capture customer feedback and how that feedback is used to inform Vendor's development and organizational priorities.

1.15.13 Provide release notes for system upgrades and enhancements over the past two years. If release notes are not available, provide a list of features enhanced or added in that timeframe.

1.15.14 Indicate what Vendor defines to be "regular" and "emergency" services, and describe the expected and guaranteed response time for "regular" and "emergency" services.

1.15.15 State what recourse is available if the proposed Solution does not perform as quoted and the Participant is faced with loss or interruption of service.

1.15.16. Indicate the provisions for service and support if Vendor's business terminates, is subjected to a strike, or shutdown for any reason.

Part 2 Technology Requirements

For each requirement, Vendor must indicate whether the feature request or requirement is fully met in the current, publicly available version of the platform (“Yes”), the feature or requirement is not available (“No”), the feature or requirement is partially satisfied by functionality available in the current release or will be available in a planned, upcoming, future release (“P”), or the feature can be custom developed as desired (“C”). If the feature or requirement is planned for a future date, Vendor must provide the release number (version) and date. Planned enhancements listed without a scheduled release date will be evaluated as if the technology is not available. If the feature can be custom developed Vendors must provide clear pricing in Appendix C:Pricing (hourly, flat rate based on scope of work, etc).

For any feature not included as part of the base Solution, but offered as an additional feature with an additional cost, make a note in Proposal and include the cost in Appendix C.

2.1 General

	Yes	No	P	C	Comments
2.1.1 Confirm that the Solution shall be 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. **					
2.1.2 Confirm that software updates are included in the maintenance contract.					

2.1.3 Provide information regarding the Solution database platform and versions supported.

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

2.1.4.1 If the Solution is on-premise, specify all hardware required to support the Solution.

2.1.4.2 If the Solution is on-premise, confirm that the Solution can be run in a Virtualized environment (VM Ware, Hyper V).

2.1.4.3 If the Solution is web/cloud-based, describe what measures have been taken to ensure resiliency/high availability.

2.1.4.4 If the Solution is web/cloud-based, describe any browser or application requirements including: supported browsers and minimum versions, dependencies on third-party software. Please note any browser specific limitations to the functionality provided by the Solution.

****2.1.5**** Provide details regarding Vendor needs and expectations for remote access to systems and open ports required for communication and data exchange between system components. ******

2.1.6 Describe Vendor process for testing and releasing software updates, and providing for business continuity during major upgrades. Describe expectations of Participant staff to apply upgrades for Solution.

2.1.7 Describe the typical frequency of software updates on an annual basis and whether software updates are required at these intervals or if they are included/or optional. Describe how Participants are notified of new software upgrades and tools available.

2.2 Performance and Reliability

2.2.1 Describe performance monitoring or other tools/techniques used to ensure consistent response times and availability of the Solution.

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2.2.2 Describe Vendor recommended/used database backup, system recovery, and failover capabilities to minimize the system downtime and risk of data loss.

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****2.2.3**** State uptime for the Solution for the past three (3) years. Scheduled maintenance that renders the Solution unavailable for typical usage, should be counted as an outage. Describe process for maintenance, including communications and Solution availability during scheduled maintenance. Define uptime commitments included in Vendor's service level agreement.**

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****2.2.4**** Provide a list of any site-wide outages over the past two years. Include the duration of the outage and an impact statement listing the services affected.**

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****2.2.5**** Describe any data loss or data corruption that occurred in the past three (3) years. Identify any customers that experienced lost or compromised data and the source of the issue.**

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2.2.6 Describe Vendor support for disaster recovery of the complete Solution in the instance of data corruption, complete data failure, complete server failure, or complete site failure. Provide evidence of comprehensive disaster recovery planning.

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2.2.7 Describe how Vendor anticipates and provides for increases in data storage needs, increasing size and scope of data sets on-line, and increasing number of users. Provide an overview of how Vendor scales both infrastructure and support personnel to meet necessary demand.

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2.2.8 If on-premise installation is recommended, provide all technical documentation including minimum requirements, database sizing recommendations, and Solution architecture and installation.

2.3 Upgrades and Maintenance

****2.3.1**** Confirm anticipated Solution availability (ideally 24/7, 365 days per year). Provide details related to scheduled maintenance windows and precautions taken to minimize service disruption due to planned maintenance.**

2.3.2 Clarify whether Vendor will host dedicated, separate production, test and training environments for Participants under this agreement. Participants may request a testing database that is refreshed nightly from production data, where new releases can be previewed and modifications tested prior to application to production. A training database should provide a de-identified/scrambled data set for use in conducting training and developing internal training documents.

2.3.3 If a dedicated, separate test environment is not provided as part of the Solution, describe Vendor's recommended strategy for safely applying and testing configuration changes and/or large-scale data changes (e.g., modifying an import file).

2.3.4 Provide details on maintenance service arrangements for the proposed Solution and the cost for any alternative available including maintenance contracts and per-call maintenance cost.

2.4 Data and Interoperability

	Yes	No	P	C	Comments

2.4.1 Confirm that the Solution utilizes common standards for data integration and interoperability.					
2.4.2 Confirm that current and historical data will be imported from Participant’s current system(s), but not limited to, demographics data, position control data, employee assignments, pay rates and related data.					

****2.4.3**** Participants require full access to extract user-generated, system and usage data. Please describe how Vendor’s proposed Solution supports this requirement. ******

2.4.4 Confirm that Participant can create unlimited custom, scheduled data extracts from the system, without the need for Vendor intervention. Share any limitations to direct access to customer data (e.g., for creating custom integrations with related software programs, custom reports and/or pulling data into Participant’s data warehousing/analytics platform. If there are any additional costs for custom and/or scheduled exports, detail those in Appendix C.

****2.4.5**** Provide a list of all Student Information Systems (“SIS”), Financial, Human Resources, Enterprise Resource Planning (ERP), Candidate Application Systems, Professional Learning, Time Reporting, Notification and other Systems that Vendor’s proposed Solution is currently integrated with (Examples: Aeries, Powerschool, Infinite Campus, Bitech, Business Plus, Schoolloop, SchoolMessenger, Blackboard). For each, please provide a brief description of the level of integration and how frequently the system can pull/refresh data from these data sources. Please also describe how the Solution facilitates unattended, automated, and secured uploads and updates. For systems that rely on data FROM the Solution, specify any limitations on the number, frequency or scope of scheduled extracts that Participant agencies can create and use. ******

SIS:

Financial:

HR/ERP:

Candidate Application:

Professional Learning:

Time Reporting:

Notification:

Other Systems:

2.4.5.1 Describe processes for establishing integrations with other Participant systems, such as professional learning management systems. Identify the degree to which the Participant may develop these integrations independently of Vendor and what costs and/or professional services will be incurred (if needed) for integrations beyond the SIS, Financial, HR, ERP, Candidate Application, and Notification systems. Any additional costs must be included in Appendix C.

****2.4.6**** Describe Vendor's data integration and loading process, including sample file layouts. ******

2.4.7 Describe tools available, methods employed, and support for creating custom, scheduled imports and exports.

2.4.8 Describe the capabilities of the Solution to provide bulk imports and exports.

****2.4.9 **** Describe the Solution's approach to interoperability with related data systems. ******

2.4.9.1 Explain the process and tools available (ex: API) for Participants to integrate the Solution with other data systems.

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2.4.9.2 Describe what formats the Solution can export both employee and substitute time records, absence/assignment information, and earnings detail (such as directly to Participants' ERP and/or in commonly used formats such as .csv or Microsoft Excel).

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2.4.9.3 Describe whether the Solution adheres to common standards (ex: Ed-Fi, One-Roster) and /or leverages third-party integration options (ex: Clever, Classlink) to improve interoperability.

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2.4.9.4 If the Solution does not utilize or confirm to any common standards, describe how Vendor guarantees data interoperability between Solution and various Participant existing systems.

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2.4.9.5 Describe the tools available and the methods employed to load data from other sources into the database tables.

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2.4.10 Describe formats available in the Solution for the import/export of data (ie: fixed length text, delimited text, HTML, CSV, and Excel).

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2.5 Security

	Yes	No	P	C	Comments
2.5.1 Confirm that the Vendor's information security policies are documented and available to clients upon request.**					

<p>2.5.2 Confirm that the Solution allows for configurable user roles that allow row-level and data set restrictions (e.g., limiting health benefits information to only select users and/or limiting access to information to employees in a particular site).</p>					
<p>2.5.3 Confirm that Ed Tech JPA and Associate Members may review Vendor internal and/or 3rd party security audits.</p>					
<p>**2.5.4** Warrant that Vendor provides background checks on all employees, and/or that only employees who have undergone said background checks will have access to Participants' data. **</p>					
<p>2.5.5 Confirm that Vendor requires all employees to sign data handling agreements at hire.</p>					
<p>2.5.6 Certify that Vendor employs and will continue to employ a dedicated CISSP certified security manager, or the equivalent, to test the Solution and run ongoing checks/improvements.</p>					
<p>**2.5.7** Confirm that Vendor is capable of providing access limitations based upon Participant roles, and give the site system administrator a tool to modify access rights at the individual level. Vendor's Solution must be configurable to provide specific user rights and roles and to restrict data access and administrative oversight to the appropriate personnel. **</p>					
<p>**2.5.8** Vendor agrees that, even if the proposed Solution is hosted by Vendor, data housed in the Solution remains the sole property of Participant and cannot be used in any way not explicitly approved by Participant. **</p>					
<p>**2.5.9** Confirm that no third-party shall be given access to Participant data for any reason without explicit, written authorization from the Participant. Any third party used to support the Solution must be identified as a designated subcontractor in the RFP response. **</p>					

2.5.10 Confirm that, should vendor house or utilize student information, Vendor agrees to execute and abide by all terms in the Standard Student Data Privacy Agreement CA-NDPA (CA-NDPA) (included in Appendix E of this RFP). **					
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2.5.11 Please specify which platforms Vendor’s proposed Solution integrates with for authentication/authorization (Active Directory, Google Single Sign On, etc.). **

2.5.12 Indicate if the Solution can be integrated with platforms for authenticated user role/permission group assignment. For example, verify that all users in a particular Active Directory Group can be automatically assigned an “employee” role in the system. Specify which platforms the Solution can be integrated with (such as Active Directory or G-Suite).

2.5.13 Provide a description of Vendor policy regarding storage, retention, and distribution of data. State Vendor data non-release policy.

2.5.14 Explain internal Vendor company protocols regarding the handling of client data.

2.5.15 The Solution shall effectively secure and protect Participant confidential information. Please describe the security measures (physical and technological) taken to protect data.

2.6 Mobile Functionality

	Yes	No	P	C	Comments
2.6.1 Confirm that the Solution provides a mobile application and/or incorporates responsive design that provides access with					

smartphone or a web browser on a smartphone.					
2.6.2 Confirm that, when accessed on a mobile device, the Solution is not limited and has all of the features a user would access on a standard desktop or laptop.					
2.6.3 Confirm that the mobile-accessible Solution allows all features to be fully functional on all browsers (Chrome, Firefox, Edge, Safari).					

****2.6.4 If multiple modules are available, clarify which modules have mobile functionality and/or an app available (Ex: the Core HR system does not, however the Substitute Management system has one available for substitute use).****

****2.6.5 Describe any differences in functionality between the mobile application and the web interface. Be specific about any missing or deprecated features for both requestors and administrative users.****

2.6.6 List all mobile operating systems that the mobile application is available in.

2.6.7 Describe any additional features of the Mobile App not already listed.

2.6.8 Provide a screenshot of the Solution as accessible by mobile browser.

2.6.9 Provide a screenshot of the available mobile application.

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2.6.10 Describe the ability within the Solution to send push notifications (ie: Are push notifications sent automatically when a status is updated? Can administrative staff send a push notification?).

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Part 3 Functionality and Usability

This section should include an in-depth description of the human resource and substitute management system. **Vendors may respond and be awarded to one or more system modules, and are not required to respond to all modules** (for example, a vendor that offers only sections 3.1 and 3.2 and not sections 3.3 - 3.6 may respond only to sections 3.1 & 3.2 and be awarded for those sections only).

Please indicate below which system modules Vendor is proposing. Indicate whether the module may be licensed individually or whether it must be combined with other modules provided by Vendor to function properly with full Vendor support. For example, if Vendor offers a specific part of the Solution, but will integrate with third party solutions, Vendor should indicate that the specific part of the Solution requiring third party integration is licensed individually. It is essential that Vendors respond in a way that demonstrates the full feature set of the human resource and substitute management system and its usability.

For any feature not included as part of the base Solution, but offered as an additional feature with an additional cost, make a note in Proposal and include the cost in Appendix C.

Module	Included in Proposal (Y/N)	Individually Licensed (Y/N)	Package Only (Y/N)	Comments (Please list applications that must be bundled with purchase if applicable)
3.1 Employee Absence Management				
3.2 Substitute Management				
3.3 Core Human Resources System				
3.4 Human Resources				

Forms and Workflow				
3.5 Additional Pay and Stipends				
3.6 Reporting				

For each requirement, Vendor must indicate whether the feature request or requirement is fully met in the current, publicly available version of the platform (“Yes”), the feature or requirement is not available (“No”), the feature or requirement is partially satisfied by functionality available in the current release or will be available in a planned, upcoming, future release (“P”), or the feature can be custom developed as desired (“C”). If the feature or requirement is planned for a future date, Vendor must provide the release number (version) and date. Planned enhancements listed without a scheduled release date will be evaluated as if the technology is not available. If proposed features can be custom developed Vendors must provide clear pricing in Appendix C:Pricing (hourly, flat rate, etc).

For any feature not included as part of the base Solution, but offered as an additional feature with an additional cost, make a note in Proposal and include the cost in Appendix C.

3.1 Employee Absence Management

3.1.1 Work Calendars and Schedules

Definitions: For the purposes of this section, work calendars refer to master calendars that specific the standard work days, non-work days, and holidays for employees in a particular classification or group (Ex. 255 work days, 12 paid holidays for full-year, classified staff). Work schedules refer to the default daily schedule of a group of employees or an individual employee (Ex. M-F, 8am-5pm, 30 minute lunch).

	Yes	No	P	C	Comments
**3.1.1.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.1.1.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
3.1.1.3 Confirm the Solution supports the creation and maintenance of multiple work calendars					

to identify default work and non-work days for different categories of employees.					
3.1.1.4 Confirm that the Solution has calendar functions to define days for which no absences should be reported (Ex: holidays).					

****3.1.1.5 Describe how employee work calendars are set up in the Solution.****

****3.1.1.6 Describe capabilities within the Solution to maintain multiple calendars for different employee groups and job classifications. Be sure to include details related to functionality and any limitations related to the number of different employee groups/job classifications.****

****3.1.1.7 Describe how the Solution creates efficiencies in the creation and maintenance of employee calendars. Demonstrate how the Solution minimizes repetitive data entry through the calendar tool (i.e., templates and master calendars, copy features, multi-select options for adding or changing dates).****

3.1.1.8 Describe capabilities within the Solution to set and globally update Participant-defined non-work days on employee work calendars. For example, a school district needs to designate a specific day as a paid, non-work day due to school closures related to a fire and evacuations in the region. How could system administrators efficiently update the work calendars of all affected groups of employees?

3.1.1.9 Describe capabilities within the Solution for administrative users to import/upload calendars specific to employee groups and job classifications. Please describe what files the Solution supports (Ex: upload excel worksheets with different calendars for different employee groups).

****3.1.1.10 Describe capabilities within the Solution to store daily schedules for employees.****

****3.1.1.11 Describe how the system supports creating default daily employee schedules. Define how default schedules can be defined (i.e., default schedules for full-time employees by work location and/or job description).****

3.1.1.12 Describe how the system adjusts employees' daily schedules based on adjustments to the default schedule for that site or classification, or based on the employees' assigned full-time equivalency (FTE).

3.1.1.13 Describe how a site administrator or system administrator may adjust an individual employee's default daily schedule to accurately reflect their work day (Ex. Default work hours at a school align with the bell schedule from 7am-4pm. However, the site has set the custodian's hours to provide for one-hour of setup time prior to the start of the school day. The desired default hours for that employee are 6am-3pm).

3.1.1.14 Describe how the system supports administrators in identifying employee work schedules that do not align with the employee's FTE or other assignment characteristics.

3.1.1.15 Describe capabilities within the Solution to maintain individual employee start and end times per day (Ex: an employee assigned a 15-hour work week may work irregular hours such as 5 hours Monday, Tuesday and Wednesday rather than 3 hours each day).

3.1.1.16 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.1.1.17 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.1.2 Time Reporting: Exception and Positive Pay

Definitions: For the purposes of this section, exception pay describes employees with a regular work schedule that are only expected to report absences or other variations to their schedule. They are presumed to be working unless an absence is reported. Positive pay describes employees that work irregular hours and/or must affirmatively report the time they have worked in order to receive compensation.

	Yes	No	P	C	Comments
**3.1.2.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.1.2.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.1.2.3 ** Confirm that the Solution supports time reporting for both exception- and positive-pay employees.					

3.1.2.4 Describe the process for recording work time (positive pay) or absences (exception pay) in the system. Include screenshots of the time reporting process.

****3.1.2.5** Describe the security options available in the system to differentiate who can enter work time and absences (i.e employee or supervisor/site designee) and when entries can be made (i.e., prior to or after the date of work/absence).**

3.1.2.6 Confirm whether visibility to and use of specific absence reasons can be restricted to specific employee groups or supervisors.

3.1.2.7 Describe any features of the system that help to prevent and identify potential issues with time reporting (i.e., reported time or absences in excess of an employee's scheduled work day, reported time on a designated holiday).

****3.1.2.8** Describe capabilities within the Solution for employees to enter their own scheduled absences. **

3.1.2.8.1. Describe capabilities within the Solution for employees to enter absence reason details and to upload documents (Ex: An employee enters an absence, writes a note about the reason, and uploads a doctor note or proof of jury service).

3.1.2.8.2 Describe capabilities within the Solution for administrative users to require absence reason details and/or documents to support specific categories of absences (Ex: Employees must write an absence reason and attach a doctor's note or proof of a COVID positive test prior to submitting an absence for COVID leave).

3.1.2.9 Describe how employees may submit absences in advance (i.e., vacation or professional learning) for approval.

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3.1.2.10 Describe capabilities within the Solution for employees to request an adjustment to future or past absence entries. Address whether the system supports modification of part of a multi-day absence and any limitations to absence adjustments. (Ex: an employee schedules a one week vacation and needs to cancel one day because of a work emergency that requires an early return).

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3.1.2.11 Describe capabilities within the Solution to track employee work-time for positive-pay employees without a set schedule (ie: employees with different hours each day can keep track of hours on a timecard).

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3.1.2.11.1 Describe the ability within the Solution for employees to clock in and out, including any time clocks available or integration of time clocks. If time clocks are available with the Solution please specify the cost here and in Appendix C.

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3.1.2.11.2 Describe the ability within the Solution for supervisors to approve work-time entered by employees (Ex: the principal must verify and approve an employee's hours prior to submitting them for payment). Specify if only direct supervisors can be given permissions to approved time, or if additional administrative users can approve (Ex: An absence for a school psychologist can be approved by principals at assigned sites or their supervisor).

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3.1.2.12 Describe capabilities within the Solution to determine the number of hours to be deducted for an absence based on daily schedules for employees (Ex: an employee with 5-hour work days requests a full day absence and 5 hours are deducted from their balance).

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3.1.2.13 Confirm whether employee absence entry can be limited to defined increments (full-day, half-day). Be specific about whether this option can be set for all employees or defined for specific groups (Ex. certificated employees must select full or half day, classified employees must enter actual hours).

3.1.2.14 Describe how defined lunch breaks are configured and maintained in the system. Clarify how lunch breaks are used in calculations of paid time and absence deductions.

3.1.2.15 Confirm employees can enter a custom number of hours for an absence (Ex. an employee may enter a full 8-hour sick absence or just a single hour for a doctor's appointment).

3.1.2.16 Describe the capabilities within the Solution to track employee CFRA/FMLA eligibility by determining the total number of hours worked over a period of time (ie: Does the Solution have automated notices? Who are automated notices sent to? Is there an available report?).

3.1.2.17 Describe reports and on-screen dashboards available to supervisors and human resources staff related to time reporting. Please include screenshots or supporting materials as needed to define the scope of reporting capabilities related to time reporting.

3.1.2.18 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.1.2.19 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.1.3 Leave Balances

Definitions: For the purposes of this section, absence reason is used to describe the type of absence or work entered to account for time at or away from work. Leave balances describes the allocation of hours/days of a particular type of excused absence and the accounting of time used against that allocation.

	Yes	No	P	C	Comments
**3.1.3.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.1.3.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.1.3.3 ** Confirm that the Solution support configurable leave types and starting balances for use in time reporting.					

**3.1.3.4 Describe the process for setting up a new absence reason and associated leave balance in the system. Include screenshots at descriptions to demonstrate available configuration options (i.e., association of leave to employee groups, approval requirements, balance enforcement). **

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**3.1.3.5 Describe any limitations to the number or type of absence reasons and leave balances that can be maintained in the Solution **

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**3.1.3.6 Describe the capabilities within the Solution to track absence balances (such as vacation hours, mandatory vacation hours, sick time, personally necessity time, etc.) based on employee type (ie: 10 month employee, 12 month employee, full time, part time, etc.).

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****3.1.3.7** Describe how the Solution calculates current leave balances, including accounting for initial and carryover allocations, balance adjustments, used leave balances, future scheduled absences and absences pending approval. **

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****3.1.3.8** Describe the ability for administrators to manually adjust leave allocations and balances for individual employees or employee groups. **

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****3.1.3.9** Describe capabilities within the Solution for employees to view absence balances, including if pending requests are calculated into available non-work days visible in the Solution (Ex 1: an employee has 50 available vacation days and requests to take 5 hours of vacation time - do they see the balance of 50 hours and pending requests totaling 45 available hours? Ex 2: Mandatory vacation days are shown as available but employees cannot schedule non-work days with them. Ex 3: Mandatory vacation days are not visible to employees.).**

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3.1.3.9.1 Describe how different absence balances are presented to employees (Ex: Vacation and Mandatory Vacation are listed separately).

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3.1.3.10 If the Solution has pre-determine absence reasons, list the different categories (Ex: Vacation, Mandatory Vacation, Illness - illness or medical appointment for self, Illness - illness or medical appointment for immediate family member, Illness - PN for compelling personal business, Jury Duty, Bereavement, Professional Development, COVID Leave, etc.).

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3.1.3.11 Describe capabilities within the Solution to create related or tiered absence reasons (Ex: Employees have a designated sick balance of 20 days per year. They may take only up to 10 of these days for care of a sick child or other personal necessities. The system should

allow up to 10 days for personal necessity; however, those days deduct from the larger sick balance. One employee may use 14 sick days and 6 personal necessity days, another might use 10 and 10).

3.1.3.12 Describe how the Solution supports implementing expiration of leave balances (Ex. COVID leave should no longer be an available option after the defined end date. Per collective bargaining agreement, employee vacation must be expended prior to the end of the fiscal year.

3.1.3.13 Describe how the Solution supports the enforcement of leave balances. Clarify to what extent the enforcement of balances can be configured in the system. (Ex. Do not allow employees to enter any vacation beyond their available balance. Allow employees to dip below a defined balance for child care only with HR approval. Allow a negative balance for sick leave or workers' compensation leave).

3.1.3.14 Describe capabilities within the Solution to retain/transfer employee balances and scheduled absences when changing school sites or position (Ex 1: An employee leaves School A and moves to School B and retains their non-work day balances and scheduled absences. Ex 2: An employee is promoted into a new position and retains their non-work balances and scheduled absences).

3.1.3.15 Describe capabilities within the Solution to have absence types that are not accessible to the employee and how administrative users would approve/enter absences (ie: comp time, worker's compensation, etc.).

****3.1.3.16 Describe how leave balances for employees can be calculated and entered in the system. Clarify which of the following options are available (if any):**

- Initial/annual balances must be manually entered.

- Initial balances automatically default for new hires based on classification/employee group.
- The Solution provides an automated import process for incorporating leave balances each year.
- Leave balances can be automatically/incrementally accrued and calculated by the employee's classification and hours worked. **

3.1.3.17 Confirm whether the system automatically recalculates employee leave allocations based on a change to the employee's FTE.

3.1.3.18 For annually applied leave balances (not incrementally accrued), confirm whether the Solution automatically adjusts leave allocations based a start date after the first work date of the year or a separation prior to the last scheduled work date of the year.

3.1.3.19 Describe reports available in the Solution regarding employee absence reason use, leave allocations and leave balances. (Ex: is a monthly report automatically generated? What information is/can be included on reports?).
Provide a sample copy of reports regarding employee absence use and leave balances. .

3.1.3.20 Describe capabilities within the Solution for Participants to determine which absence reasons rollover to the following fiscal year and which do not (Ex: at the end of the fiscal year an employee has 100 hours of Illness leave, which is added to the Illness leave for the following year. The employee has 10 hours of Vacation time, which is not added to the Vacation leave for the following year).

3.1.3.21 Describe how the Solution supports mass changes to absence reasons used on a particular date for classifications for employees. For example, a district chooses to close school related to a fire and related evacuations. The district wants to change the day to a new absence reason ("School Closure - Paid Time Off") for all employees. As part of that

process, the district wants to remove any previously entered absences for planned vacations or sick time.

3.1.3.22 Describe capabilities within the Solution to send low balance warnings to employees, supervisors, and designated personnel within Human Resources (Ex: when absence balances reach a certain threshold emails are sent to the employee, their direct supervisor and HR).

3.1.3.23 Confirm whether the system supports employee-initiated leave balances adjustments and transfers, such as a donation of some sick time to a catastrophic leave bank for seriously ill colleagues.

3.1.3.24 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.1.3.25 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.1.4 Absence Approvals

	Yes	No	P	C	Comments
**3.1.4.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.1.4.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

3.1.4.3 Confirm that employees must access the Solution to schedule absences.					
3.1.4.4 Confirm that administrators can enter absences on behalf of absent employees if the employees are unable to enter absences themselves.					

****3.1.4.5** Describe how the Solution allows for different approval processes based on the type of absence (Ex: A Participant requires no approval for Illness absences, Manager approval is required for Vacation absences, and HR approval is required for Personal Necessity/Specialized absences).**

****3.1.4.6** Describe how employees are notified when an administrator approves an absence.**

3.1.4.7 Provide screenshots to demonstrate how approval options are configured in the Solution and how approval workflows are defined.

****3.1.4.8** Describe how administrative users that can approve absences can be defined in the Solution (ie: employee work location, employee time reporting location, employee supervisor position/employee ID, and other permissions/routing options).**

3.1.4.9 Describe how the Solution allows for different approval processes based on the type of employee.

3.1.4.10 Describe capabilities within the Solution to require multiple levels of approval (Ex: manager approval followed by HR approval).

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3.1.4.11 Describe capabilities within the Solution for administrative users to approve a high volume of absences (Ex: what is the process to approve multiple absence requests within a department for the same day?). Provide screenshots to demonstrate the process

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3.1.4.12 Describe capabilities within the Solution to notify employees, supervisor & HR staff when absence balances run negative (ie: does the solution have a pop-up, email notification to employees, or is the balance available to check without a specific prompt?).

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3.1.4.13 Describe how the Solution ensures that employees do not enter absences that are over/understated (Ex: prevents employees from entering absences for longer than their regular work day by including their lunch break in the absence or by entering AM instead of PM).

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3.1.4.14 Describe how the Solution supports employees that work multiple jobs and/or work at multiple sites (ie: how does the Solution support calendars and approvals?).

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3.1.4.15 Describe how employees can combine multiple day absences and how they appear to administrative users (Ex: An employee requests 8 hours of absences on both Monday and Friday, the administrative user can see which days are requested, the hours per day and the total hours).

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3.1.4.16 Describe how employees can enter multiple absence reasons for one day (Ex: An employee enters 3 hours of personal necessity for a doctor appointment and enters 5 hours of vacation to take the rest of the day off). Describe how different routing requirements for absences will apply.

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3.1.4.17 Describe capabilities within the Solution to provide regular automated reports via email with requested data points (Ex 1: Daily report to HR, Ex 2: weekly report to school sites).

3.1.4.18 Describe data points that can be included and sorted in reports (Ex: approved absences, pending absences, absence balances, low balances, negative absence balances, absent employees, job type/employee classification, school site, unfilled absences, etc.).

3.1.4.18.1 Describe different reports available to different administrative users (ie: school site reports v. HR reports).

3.1.4.18.2 Provide sample reports.

3.1.4.19 Describe how regularly generated reports are routed to administrative users (Ex: Principals and managers receive a daily report of who is out that day and who has requested the date off. Itinerant staff are included in reports to both managers and principals).

3.1.4.20 Describe how the absence approvals module integrates with the substitute management module (Does the integration notify administrators of expected substitute needs and unfilled absence rates? Does an approved employee absence automatically generate a substitute job in the substitute management module?).

3.1.4.21 Describe the capabilities within the Solution to allow administrative users to change/override absence reasons entered by employees (Ex: an employee enters a doctor appointment as Illness when it should be entered as Personal Necessity).

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3.14.21.1 Describe the capabilities within the Solution to allow administrative users to change absence reasons entered by employees *from a list view* (ie: Administrative users can change absence reasons for many employees at once from a list view rather than clicking into each employee’s scheduled absence to modify the absence reason).

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3.1.4.22 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.1.4.23 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.1.5 Payroll Integration

	Yes	No	P	C	Comments
**3.1.5.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.1.5.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.1.5.3 ** Confirm that the Solution either offers capability to directly extract information necessary to Payroll or directly integrates with a Payroll Solution.					

****3.1.5.4** Describe the Solution’s capabilities to directly integrate with Payroll solution(s) or extract data for import into Payroll systems. Minimally, the Solution must be able to automate the extraction of employee identifier/assignment details, work hours (positive pay employees), and leave utilization for a defined period of time). ******

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****3.1.5.5** Describe and provide screenshots of workflows, views, reports and any other tools that support data validation and verification of time reporting and absence data prior to submission to Payroll. ******

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3.1.5.6 Identify any pre-defined reports or tools designed to identify common payroll issues (i.e., employees working in excess of scheduled hours, unverified absences, monitoring of benefits thresholds).

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3.1.5.7 Describe the capabilities within the Solution to automatically calculate and deduct pay when employees have a negative leave balance. Describe options for possible calculation logic for the deduction (Ex 1: When a teacher’s absence balance is negative the cost of a substitute is deducted from their pay. Ex: 2: When a classified employee’s absence balance is negative their hourly/daily rate is deducted from their pay).

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3.1.5.8 Describe capabilities within the Solution to prevent overpayments for employees working multiple jobs. For example, a full-time custodian is substituting for the lead custodian while he is on leave. The employee should only be paid the lead custodian (substitute) rate for those days, not the regular salary plus substitute rate.

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3.1.5.9 Describe how the Solution supports payroll adjustments for absences related to employees’ transition to new roles, new FTE, or location/supervisor when there are previously scheduled future absences (Ex 1: A teacher transitions to an administrator role and has a calendar change. Ex 2: A classified employee transfers from IT to HR and has a new manager. Ex 3: A classified employee increased their FTE, but previously entered a future absence matching the old FTE).

Calendar Change:

Supervisor/Manager Change:

FTE Change:

3.1.5.10 Describe how different absence balances are presented in relation to the payroll system. Share configurable options for defining which balances are shared with Payroll and affect employee pay.

3.1.5.11 Describe capabilities within the Solution to support partial payments when an employee exhausts their absence balances. Participant's agencies may have collective bargaining agreements that support differential pay - a reduced salary for a limited period of time after an employee has exhausted their current leave balances (Ex 1: a classified employee exhausts absence balances and the Solution automatically issues their pay as a percentage of regular pay and notifies HR and payroll administrative users. Ex 2: a certificated employee exhausts absence balances and the Solution automatically issues their pay as their regular rate minus the cost of a substitute/defined deduction and notifies HR and payroll administrative users.).

3.1.5.12 Describe capabilities within the Solution to support extended absences with a reduced rate of pay.

3.1.5.13 Describe how the Solution supports payment of hours beyond an employee's regularly scheduled hours. Confirm whether the system can automatically compensate employees for extra hours or overtime based on time entered.

3.1.5.14 Describe reports within the Solution and/or automatic notifications to administrative users when employees reach a certain threshold of hours worked or consecutive days of absence (related to benefits eligibility, leave triggers, and other contract provisions).

3.1.5.15 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.1.5.16 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.1.6 Itinerant Employee Management

Definitions: For the purposes of this section, an itinerant employee is defined as an employee with more than one work location for the same assignment (Ex. a school nurse supporting four schools).

	Yes	No	P	C	Comments
**3.1.6.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.1.6.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

3.1.6.3 Describe how itinerant employees are entered into the Solution. Clarify whether the Solution supports recording multiple work locations for a single job/assignment.

3.1.6.4 Describe how the Solution supports shared visibility for site administrators and central administrators for itinerant employees (Ex: School Psychologist absences are visible to their supervisor and also school site principals).

3.1.6.4.1 If multiple administrative users can view an employee absence, describe capabilities within the Solution to restrict the ability to approve absences to only one administrative user (Ex: School Psychologist absences can be approved only by their supervisor, but are visible to their supervisor and also school site principals).

3.1.6.5 Describe how work calendars for itinerant employees can be uploaded/entered to reflect specific hours at each site each day (Ex: A school psychologist is at School A 8am - 1pm M-Th, School B 2pm - 4pm M-Th, and School C 8am - 4pm Fridays).

3.1.6.6 Describe how work calendars for itinerant employees *with different roles* can be uploaded/entered to reflect specific hours in specific roles at each site each day (Ex: A teacher's assistant works from 8:00am - 12:00pm in their assigned role and also picks up a substitute job 12:30pm - 3:30pm).

3.1.6.6.1 Describe capabilities within the Solution to apportion leave appropriately to applicable employee roles.

3.1.6.6.2 Describe capabilities within the Solution to dock pay appropriately to applicable employee roles.

3.1.6.7 Describe capabilities within the Solution to track where employees are throughout the work day (Ex: time-clock or other functionality that allows administrative users to see that employees were at their assigned location).

3.1.6.8 Please describe any additional functionality to manage itinerant employees available as part of the core/proposed Solution or as an optional solution that is available for

purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.1.6.9 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.2 Substitute Management

3.2.1 Substitute Skill/Job Matching

	Yes	No	P	C	Comments
**3.2.1.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.2.1.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.2.1.3 ** Confirm the Solution can support management of multiple types of substitute assignments (i.e., teacher, administrator, custodial, nutrition) and match substitutes according to their eligibility for those assignments.					

**3.2.1.4 ** Describe capabilities within the Solution to integrate with and import employee and substitute information from Human Resources solutions, including demographics, contact information, assignment information, and eligibility for specific types of work (class of substitute or employee job code).

3.2.1.5 Describe capabilities within the Solution to track expiration dates of credentials, tuberculosis tests, and other Participant criteria.

3.2.1.5.1 Describe the capabilities within the Solution to add customized Participant criteria (Ex: Substitutes are required to have COVID 19 vaccinations, completed mandated training, etc). Please include any limitation to the amount of customized Participant criteria that can be entered into the Solution.

3.2.1.6 Describe any restrictions within the Solution for substitutes whose credentials, tuberculosis tests, and/or other district criteria have expired (ie: Does the Solution prevent them from accepting available substitute jobs?). Clarify the extent to which these restrictions are automated based on data in the system or require manual intervention by a user upon expiration.

3.2.1.7 Describe any automated communications from the Solution to substitutes notifying them of upcoming expiration dates (Ex: A substitute's tuberculosis test is set to expire in 60 days and an email is automatically generated and sent to the employee notifying them that they need to submit updated records to remain active in the system).

****3.2.1.8 Describe the capabilities within the Solution to establish categories of jobs/skills that substitutes are eligible to fill by matching against associate skills (i.e., different jobs such as custodian, technician, teacher and/or different teaching subject areas such as world languages or higher-level math). If there are pre-determined categories please list them here; if categories can be customized please include the number of possible categories and any limitations. ****

3.2.1.8.1 Describe capabilities within the Solution to automatically match substitutes with available jobs based upon selected categories (Ex: A substitute with music knowledge is notified of an open choir substitute job).

3.2.1.8.2 Describe any grouping mechanisms within the Solution to define classes of substitutes. Clarify how those groupings (e.g., authorized special education substitutes) can be used throughout the system for automations and reporting.

3.2.1.9 Describe the capabilities within the Solution for substitutes to establish preferences by school, grade level, and subject and how these can be sorted when assigning substitute jobs (Ex: Substitute A prefers to teach students in grades 3 - 6 at her neighborhood school).

3.2.1.10 Describe capabilities within the Solution for substitutes to define days they are available or unavailable for substitute jobs and how this affects job notifications (Substitute A is unavailable on Mondays and the Solution does not notify them about available substitute jobs that include Mondays).

3.2.1.11 Describe capabilities within the Solution for substitutes to set a do not disturb or temporarily unavailable status and how this affects job notifications.

3.2.1.12 Describe capabilities within the Solution for employees and or schools to manage a preferred list of substitutes for first viewing of substitute jobs (Ex: Teacher A lists her 5 favorite substitutes to receive first notice when she plans to be out of the classroom). Please specify how the Solution determines that other substitutes should be notified (Ex: Preferred substitutes need to decline the job prior to other substitutes being notified or non-response within a certain time frame is considered a decline.).

**3.2.1.13 Describe capabilities within the Solution to prioritize high-need substitute jobs that should be filled first (ie: prioritize specific substitute jobs or jobs at a specific school site). **

3.2.1.14 Describe capabilities within the Solution for employees to leave notes, attachments, slide decks, and/or links for the substitute (ie: can teachers leave sub plans in the Solution?).

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3.2.1.15 Describe the capabilities within the Solution to autofill some substitute jobs and to hold other substitute jobs for administrative users to manually fill (Ex: Special Education Behavioral Intervention wants to manually assign a core set of substitutes based on priority, however most substitute jobs should be immediately made available for substitutes to accept).

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3.2.1.16 Describe substitute evaluations available in the Solution and related reports.

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3.2.1.17 Describe capabilities within the Solution to communicate with substitutes (ie: can administrative users send mass emails, on screen alerts or another form of communication to substitutes through the Solution?).

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3.2.1.18 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.2.1.19 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.2.2 Automated Callout and Assignment Management

	Yes	No	P	C	Comments
**3.2.2.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					

<p>**3.2.2.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **</p>					
<p>3.2.2.3 Confirm that the Solution allows for prearranged substitutes.</p>					
<p>3.2.2.4 Confirm that the Solution has calendar functions to define days for which substitutes are not required and no employee absences should be reported (professional learning days, weekend and holidays).</p>					
<p>**3.2.2.5 Confirm that the Solution provides simultaneous access to individual job postings on all means of notification (Ex: the web, telephone, and app) for substitutes to access and accept, as long as they meet the qualifications of the job offered (Ex: If Solution is making outbound calls to find a substitute to fill a job, another substitute can see and accept the same job on the app during the automated outbound calling process).**</p>					
<p>**3.2.2.6 Confirm that when a job is accepted it is no longer visible or available to other substitutes. **</p>					

****3.2.2.7** Describe how substitutes are notified of available jobs and the process for accepting and confirming an assignment. Include all options for searching for, viewing and accepting jobs, including screenshots and/or a description of options such as automating calling/phone interface, mobile app, and website.******

3.2.2.8 Describe capabilities within the Solution to read notes for a substitute job when phone calls are sent and/or make notes added by a teacher or administrator available on the website and in the mobile app (ie: the phone call includes details of the substitute job and reads teacher notes so the substitute does not need to log in to the Solution to view them).

3.2.2.9 Describe the process for substitutes to reject jobs, if they must indicate why (please include any pre-established reasons to select from), and if they can accept other jobs on the same day they have declined an available job.

3.2.2.10 Describe how far in advance a substitute can be assigned for a substitute job

3.2.2.11 Describe how long it takes for a substitute job to be available/sent to substitutes after the job is entered and/or the employee enters an absence.

****3.2.2.12 Describe the process for administrative users to approve employee absences in relation to a substitute job becoming available. Please also describe if it is possible to require employee absence approval prior to making a substitute job available. ****

****3.2.2.12.1 Describe automated communications directed to administrative users when an employee posts an absence and when a substitute confirms acceptance of a job (Ex: emails are sent to direct supervisors, site administrative users, and HR when a teacher posts an absence and when a substitute accepts the substitute job). ****

****3.2.2.12.2 Describe automated communications directed to employees who have submitted an absence when a substitute confirms acceptance of the resulting substitute job (Ex: email is sent to a teacher when a substitute confirms acceptance of the substitute job related to the teacher's absence). ****

****3.2.2.12.3 Describe automated communications directed to substitutes who have accepted a job. Please include details included in the communications and any reminders sent to substitutes regarding accepted jobs (Ex: an email with the day, times, location, class**

details and teacher notes and attachments is sent upon acceptance of the job and a reminder email with the same information is sent 1 day prior to the job start date). **

3.2.2.13 Describe any integrations with calendars designed to help substitutes keep track of accepted substitute jobs. Please clarify which platforms the Solution integrates with (Ex: A substitute accepts a job and a calendar event can be sent to their Outlook and Google calendars.).

**3.2.2.14 Describe how the Solution lists information for administrative users regarding employee vacancies/substitute jobs (Ex: A list that shows vacancies by site, employee absence reason, if the absence has been filled, etc.). **

3.2.2.15 Describe real-time visibility of unfilled jobs for site administrators and HR.

3.2.2.16 Describe capabilities within the Solution for administrative users to schedule recurring automated reports regarding unfilled employee absences and how those reports are delivered (Ex: reports are delivered to HR and applicable school sites via daily emails).

3.2.2.17 Describe capabilities within the Solution to automate alerts based on anticipated substitute usage and unfilled employee vacancies.

**3.2.2.18 Describe capabilities of the Solution to access historical reporting and how that reporting is accessible (Ex: An administrative user runs a report to see what the number of employee absences was a year ago). **

3.2.2.19 Describe capabilities within the Solution to automatically alert administrative users of upcoming dates that may require a higher volume of substitutes due to employee absences (ie: Historically high absence days, holidays, etc.).

3.2.2.20 Describe capabilities within the Solution to support annual reasonable assurance (ie: Substitutes must return a letter stating their intent to return to work in the upcoming school year. Does the Solution support sending letters to Substitutes; tracking who has returned them, etc?).

3.2.2.21 Describe reports available in the Solution to show how long it has been since a Substitute accepted a substitute job.

3.2.2.22 Describe the process for administrative users to change a substitute from active to inactive (Ex: a substitute has not accepted a job for 19 months and is marked as inactive).

3.2.2.23 Describe the process for teachers or administrative users to block substitutes. If teachers can block substitutes please also describe capabilities of administrative users to override teacher preferences (Ex 1: A site notifies HR of problematic behavior by a substitute and administrative users block them from accepting future substitute jobs. Ex 2: A teacher blocks a substitute, however it is determined that the substitute's behavior was not problematic and the administrative user overrides the teacher's block.).

****3.2.2.24 Describe capabilities in the Solution for substitute jobs to be automatically linked to employee absences (Ex: a teacher calls in sick and a substitute job is created that automatically lists details regarding the school site, grade, subject, etc.).****

3.2.2.25 Describe capabilities in the Solution for administrative users to enter additional substitute jobs that are not tied to an employee absence (ie: a site needs additional assistance).

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3.2.2.25.1 Describe capabilities within the Solution to require additional information for a substitute job that is not linked to an employee (ie: the administrative user entering the substitute job must enter required information/details prior to the job being posted).

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3.2.2.26 Describe capabilities of systems administrators and site managers to quickly reassign scheduled substitutes to different absences based on need.

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3.2.2.27 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.2.2.28 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.2.3 Substitute Timekeeping

	Yes	No	P	C	Comments
**3.2.3.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.2.3.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

****3.2.3.3** Describe capabilities within the Solution for substitute jobs to be entered as either a set time or specific hours depending on the class of substitutes (ie: Substitute jobs can be available as full or half day for certificated employees and specific hours for classified employees).**

Set Times:

Specific Hours:

****3.2.3.4** Describe the ability for administrative users to override hours worked for a substitute job (ie: Increase hours worked due to substitute working extra hours or decreasing hours due to late arrival). **

3.2.3.5 Describe capabilities of the Solution to identify conflicts in work hours (Ex 1: A teacher's assistant accepts a substitute job during their regular work day as a teacher's assistant. Ex 2: A substitute attempts to accept two substitute jobs that overlap).

3.2.3.5.1 Describe capabilities within the Solution to automatically merge two half days on the same into one full day of pay (Ex: Substitute A works a substitute job for half a day for Teacher A and half a day in another assignment for Teacher B. Substitute A should be paid for one full day of work, not two half days).

3.2.3.5.2 Describe capabilities within the Solution to ensure that employees substituting in a different job/classification during their regularly scheduled assignment are paid only for the substitute job (Ex: Substitute A is an instructional assistant working 3 hours a day, however they accepts a full day substitute job during their regularly scheduled instructional assistant hours. Substitute A should be paid for only one full day of substitute work and not also be paid for 3 hours as an instructional assistant).

3.2.3.5.3 Describe capabilities within the Solution to ensure that employees substituting in a different jobs/classifications during *part* of their regularly scheduled assignment are paid for

the substitute job and the amount of hours worked in their regular position (Ex: Substitute A is an instructional assistant working 3 hours a day and accepts a half day substitute job working 3 additional hours after their instructional assistant hours are complete. Substitute A should be paid for 3 hours as an instructional assistant and a half day as a substitute).

3.2.3.6 Describe capabilities within the Solution to notify administrative users when a substitute is approaching working more 75% of the school year (Ex: an automatically generated email is sent to HR when the employee has worked 70% of the school year).

3.2.3.7 Describe capabilities within the Solution to prevent substitutes from accepting assignments once they have reached their maximum number of days/hours (ie: after a substitute has worked 74% of the school year they are prevented from accepting additional assignments).

3.2.3.8 Describe capabilities within the Solution to notify administrative users when a substitute is approaching working the maximum number of days for a single assignment (Ex: an automatically generated email is sent to HR when the employee has worked 55 days in the same assignment).

3.2.3.9 Describe capabilities with the Solution to prevent a substitute from working over the maximum days for a single assignment (ie: they are prevented from accepting jobs for the same assignment/employee absence).

3.2.3.10 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.2.3.11 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.2.4 Payroll Integration

	Yes	No	P	C	Comments
**3.2.4.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.2.4.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

3.2.4.3 Describe any reminders automatically generated by the Solution for site administrative users and substitutes to submit hours and confirm assignments prior to the generation of the output files/reports and payroll being issued.

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3.2.4.4 Describe any reminders automatically generated by the Solution for administrative payroll users to validate payroll output files/reports prior to finalizing them (Ex: reminder emails regarding missing information, absences that have not yet been confirmed, missing budget numbers, etc.).

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3.2.4.5 Describe the process for administrative users to validate payroll output data or files *for their site* (ie: review entered time, roles, budgets, etc prior to issuing paychecks).

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3.2.4.6 Describe the process for *payroll* administrative users to validate payroll output files after the pay period closes (ie: review entered time, roles, budgets, etc prior to issuing paychecks).

--

****3.2.4.7 Describe output files that can be generated by the Solution and if they can be set to automatically generate.****

3.2.4.7.1 Describe the extent to which output files can be customized and any limitation to the number of fields.

****3.2.4.7.2 Provide sample output files available in the Solution.****

3.2.4.7.3 Describe reports designed to list missing substitute hours (Ex: which employee absence they were assigned to, absence reason, length of assignment).

3.2.4.7.4 Describe audit reports available in the Solution designed to identify missing information from the expected payroll load and provide samples.

3.2.4.8 Describe capabilities within the Solution to proactively flag errors in payroll output files/reports (Ex: a budget number is entered with not enough digits and the Solution sends an email to the administrative site user who entered the budget and sends a notification to payroll).

****3.2.4.9 Describe the Solution's ability to support standardized account code structure (SACS) for the purposes of charging back assignments. ****

3.2.4.9.1 Describe any capabilities within the Solution to restrict administrative users to specific budget numbers when entering assignments (ie: prevent a site from inadvertently using another site's budget).

3.2.4.9.2 Describe any capabilities within the Solution to route assignments for administrative user approval based on the budget number entered (ie: prevent a site from inadvertently using another site's budget).

3.2.4.9.3 Describe capabilities within the Solution to set up employees with a default budget number/account code to be used for absence assignments (ie: teachers for Site A are set up so their substitutes are automatically assigned to Site A's budget number).

3.2.4.9.4 Describe capabilities within the Solution to set up *substitutes* with a default object budget number to be used for absence assignments.

3.2.4.9.5 Describe the ability within the Solution to set up additional default budget numbers based on absence reason type and by site.

3.2.4.9.6 Describe the ability within the Solution for custom budget numbers to be entered at the time of the employee absence or confirmation of substitute job (Ex: professional learning event that has a specific budget number tied to substitute jobs).

3.2.4.10 Describe the capabilities within the Solution to support pay rate changes based on the longevity of the substitute or a specific assignment. (Ex. substitutes receive an increase of \$15/day after they have been in an assignment for longer than 10 consecutive days).

3.2.4.10.1 Describe the capabilities of the Solution to identify the following scenarios and support associated pay increases based on:

- Total days a substitute has worked in the current school year,
- Consecutive days worked in a specific assignment,
- Consecutive days worked substituting for a specific employee (Ex. substituting for 10 consecutive work days for the same teacher even if the job/assignment number changes),
- Consecutive days worked (independent of assignment), and/or
- Other scenarios related to substitute assignments.

****3.2.4.11 Describe capabilities within the Solution to enter set daily rates for substitutes (Ex: Substitute teachers make a set amount for half days and a different set amount for full days). Be sure to include any limitation related to the number of roles that can have different daily rates.****

3.2.4.12 Describe how substitute pay rate is entered (ie: Do administrative users set it for each assignment? Does the Solution automatically assign a pay rate based on job/role/range?).

3.2.4.12.1 If the Solution can be configured to automatically assign pay rates for substitutes based on job/role/range check how the Solution can be set up to determine what the pay rate is.

	Substitute job/role/range entered in HR system (ie: a substitute has a set range for every assignment).
	The job/role/range of the employee they are substituting for (ie: a substitute is assigned a pay rate based on the employee who the assignment is based on).

3.2.4.13 Describe capabilities within the Solution to receive a file from a Payroll platform and automatically update/confirm if the assignment has been paid.

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****3.2.4.14 Describe payroll reports or file extracts that can be generated by the Solution and if they can be set to automatically generate.****

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3.2.4.14.1 Describe the extent to which payroll reports within the Solution can be customized and any limitation to the number of fields.

--

****3.2.4.14.2 Provide sample payroll reports available in the Solution (minimally including substitute assignment, hours/days worked, and confirmation/verification of work).****

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3.2.4.15 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.2.4.16 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.3 Core Human Resources System

3.3.1 Position Control

Definitions: For the purposes of this section, a one-to-one position describes a position in the budget for which there is a dedicated allocation and for which there is typically a single headcount filling the position or a pre-specified FTE. Pool positions generally describe positive

pay positions that are not budgeted by a specific FTE (i.e., substitutes), but are budgeted by a predetermined estimate of expenditures.

	Yes	No	P	C	Comments
**3.3.1.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.3.1.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
3.3.1.3 Confirm that the Solution can support both one-to-one and pool positions.					

3.3.1.4 Provide an overview of the Solution's position control features. Explain how positions are created/allocated within the Solution and how the design support sound budgeting and staffing practices.

3.3.1.5 Describe capabilities within the Solution to differentiate rules based on whether a position is one-to-one or a pool, including what information is required or allowed (Ex: substitute and short term positions do not require FTE).

3.3.1.6 Describe capabilities within the Solution for administrative users to set target allocations by FTE, hours, dollar amount, account code, or job code.

**3.3.1.7 Describe reports available in the Solution to identify vacant positions, including long-vacant positions that may need to be eliminated. **

**3.3.1.8 Describe features and reports within the Solution designed to help administrators monitor current staffing relative to allocations, such as reports of vacant positions with

vacancy duration, positions that are filled at a higher or lower FTE than originally budgeted, and positions with multiple headcounts. **

3.3.1.9 Describe how the solution uses definition tables to support data integrity and minimize data entry. For example, define attributes stored in the job code table (i.e., bargaining unit, salary range) that default into the position when a new position is created. Define attributes established at the position level (i.e., job code, account code, work location) that default into the assignment.

3.3.1.10 Describe capabilities within the Solution to create default settings for like positions and save templates for positions.

3.3.1.11 Describe capabilities within the Solution to define groups of positions for easy access to reports (Ex: all classroom teachers).

3.3.1.12 Describe capabilities within the Solution for administrative users to create custom position attributes (ie: CALPADS code for state reporting).

3.3.1.13 Describe capabilities within the Solution for effective date changes on positions to automatically update corresponding assignments (Ex: change of account code effective as of 2/1/22).

3.3.1.14 If the Solution does not automatically synch effective dated changes on positions with the assignments of incumbents in the position, describe tools available to identify potential mismatches between position and employee assignment data (Ex. an account code change reflected on the position record, but not the assignment record).

****3.3.1.15 Describe capabilities in the Solution to estimate total costs of established positions and any other reports or tools available to assist with proactively managing staffing costs.****

3.3.1.16 Describe capabilities within the Solution to generate *current* year projections, incorporating actual year-to-date employee costs plus projected costs for the remainder of the year. Be specific about how the Solution would estimate:

- Year-to-date actual costs of employees' salaries and benefits,
- Projected costs for the remainder of the year of employees' salaries and benefits,
- Savings due to current, past and predicted vacancies,
- Forecasted salary increases such as step and longevity advancement, and/or
- Other potential adjustments to positions or pay that may affect expenditures.

3.3.1.17 Describe capabilities within the Solution to support *future* year projections incorporating the anticipated costs of employees and positions in the subsequent 1-3 fiscal years. Be specific about how the Solution would estimate:

- Estimated costs for the full, subsequent years of salary and benefits for staffed positions,
- Estimated costs for vacant positions and new positions established (Ex. assume vacant positions would be filled at step 3 of the salary schedule for the year),
- Increased costs based on step and longevity advancement,
- Other factors affecting budget.

3.3.1.18 Describe the Solution's ability to support simulations for the purposes of budgeting (Ex. generate a report/estimate with account-code level detail of the budgetary impact of a 2% salary increase for a particular bargaining unit).

3.3.1.19 Describe capabilities within the Solution to track and reconcile temporary positions (Ex. Fiscal needs to identify positions established with a one-time funding source such as a

grant, notify administrators of the expiration of the funding, and assess the impact to incumbents in those positions).

3.3.1.20 Describe capabilities within the Solution to integrate with Student Information Systems to support comparing current staffing levels against enrollment and class size data for the purposes of refining allocations.

3.3.1.21 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.3.1.22 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.3.2 Employee Information and Assignments

	Yes	No	P	C	Comments
**3.3.2.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.3.2.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
3.3.2.3 Confirm that employee assignments are integrated with the Position Control module such that position details (i.e., job code, work location, account code) default from the position number.					

**3.3.2.4 Provide an overview of the employee personal and assignment information pages and features within the Solution. Include screenshots and a general overview of how the Solution organizes employee data. **

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****3.3.2.5** Describe the extent to which Participants have the flexibility to create custom or configurable fields related to employee demographics and assignments.**

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****3.3.2.6** Describe how permissions to aspects of employee data are defined in the Solution. For example, how can Participants differentiate HR user roles and permissions to limit access to discipline data, leaves of absence details, benefits information, and management of definition tables (i.e., job code characteristics)..**

--

****3.3.2.7** Confirm which of the following features/functions are available within the Core HR Solution:

- Employee demographics and contact information
- Emergency contacts
- Employee work assignment
- Employee salary administration
- Benefits management
- Employee evaluations and discipline tracking
- Employee credential/certification management
- Education/training management
- Administration of leaves
- Other Compliance monitoring

If any of these features are not included in the base product costs, describe the additional costs here and in Appendix C.

**

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3.3.2.8 Describe capabilities within the Solution for administrative users to specify which fields are editable at the assignment level by site administrative users for some positions (ie: salary range may be editable for certificated positions, but not classified, job code may not be editable on the assignment level, but salary step is).

--

3.3.2.9 Describe capabilities within the Solution to support multiple assignments and incorporate warnings related to FTE/specific hours (ie: monitor for benefits eligibility based on combined jobs over .5 FTE or combined jobs over 1 FTE). Describe any automated communications generated by the Solution and how warnings can be differentiated based on types of jobs (ie: certificated and classified).

3.3.2.10 Describe capabilities within the Solution to track and monitor employee credentials, training, certificates, Tuberculosis tests, and other compliance requirements.

3.3.2.11 Describe capabilities within the Solution to track evaluation dates and any automated notifications/messaging to managers about upcoming and overdue evaluation dates.

3.3.2.12 Describe capabilities within the Solution to track employee probation dates, including if the Solution can automatically change employee status after probation is completed.

3.3.2.13 Describe reports or queries available to produce seniority lists based on seniority dates, as well as job classification and/or credential data.

****3.3.2.14** Confirm whether an annual rollover process is required at the start of each Fiscal year or whether positions and employee data are continuously maintained (i.e., new, effective dated rows are entered at the employee/assignment level and on definition tables only when needed to support changes). . If an annual rollover process is required, describe the process in detail and the duration of any system unavailability to end-users as part of that process.**

3.3.2.15 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.3.2.16 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.3.3 Salary Administration

	Yes	No	P	C	Comments
**3.3.3.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.3.3.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

3.3.3.3 Provide an overview of the Solution's salary administration features including tools to accurately set employee's initial salary and additional pays, as well as managing salary changes.

3.3.3.4 Describe capabilities within the Solution to support multiple salary ranges, steps within salary ranges, columns based on post graduate units, longevity based on years of experience, and multiple schedules/calendars.

3.3.3.5 Describe capabilities within the Solution to automatically prorate pay for employees who start after the first day of the fiscal year (ie: the Solution automatically calculates pay based on FTE and number of anticipated days of work).

3.3.3.6 Describe capabilities within the Solution to automatically prorate pay for employees whose employment is terminated prior to the last day of the fiscal year (ie: the Solution automatically calculates pay based on FTE and number of anticipated days of work).

3.3.3.7 Describe capabilities within the Solution to calculate and store total cost for each employee, including projected work days and benefits. Provide screenshots to demonstrate how authorized personnel can view this data.

3.3.3.8 Describe capabilities within the Solution to default employee pay rate to the appropriate salary range based on the employee's job classification.

3.3.3.9 Describe capabilities within the Solution to support multiple types of salary calculations (ie: hourly rate, daily rate, and annual salary/monthly rate).

Hourly Rate:

Daily Rate:

Annual Salary/Monthly Rate:

3.3.3.10 Describe capabilities within the Solution to separate pay based on pay type (ie: regular pay, overtime pay, stipends, longevity, column movement, etc).

3.3.3.11 Describe capabilities within the Solution to support calculation of retroactive payments, including retroactive additional pay components (Ex: a retroactive 2% pay increase for all employees is awarded in October and retroactive to July 1st).

3.3.3.12 Describe capabilities within the Solution to project and view an employee’s projected actual salary/cost based on anticipated work days (prorated annual pay for employees hired after the start of the fiscal year, regular annual pay for years after that), step pay increases, and longevity.

3.3.3.13 Describe capabilities within the Solution to support changes to positions in cost and/or hours with different effective dates (Ex: Position A is approved for a reclassification at a higher pay range effective September 15th, and Position B is approved to work an additional 5 hours per week effective January 20th, the fiscal year begins on July 1st).

Cost:

Hours:

3.3.3.14 Describe capabilities within the Solution to support retroactive or future changes to positions (Ex 1: Employee A’s pay rate change is approved in October with a July 1st effective date. Ex 2: Employee B’s pay rate is approved in October with a January 1st effective date). Be sure to describe how the Solution automatically calculates salary adjustments based on effective date.

Retroactive:

Future:

3.3.3.15 Describe capabilities within the Solution to support automated employee salary step increases.

3.3.3.15.1 Describe capabilities within the Solution to identify employees that are eligible for step increases on a set date versus an anniversary date (Ex 1: School District A administers step increases on July 1st each year. Ex 2: School District B administers step increases on each employee’s anniversary of employment).

Set Date:

Anniversary Date:

3.3.3.15.2 Describe capabilities within the Solution to identify employees that are eligible for step increases based on percentage of the fiscal year worked, and the ability to track it over multiple years (Ex: School District A gives employees step increases based on working 75% of the fiscal year; Employee 1 works 100% of the year and is eligible for a step increase. Employee 2 works 25% of the year and will be eligible for a step increase after 3 years of working).

3.3.3.15.3 Describe capabilities within the Solution to identify employees that are eligible for step increases based on a set hire date or fixed time of work (Ex: District A gives employees step increases effective July 1st if they were hired prior to January 1st).

3.3.3.15.4. Describe capabilities within the Solution to maintain different step increase schedules for different employee classifications (Ex: Certificated employees step up annually based on percentage of the year worked, classified employees step up annually based on the date they were hired, and administrators step up every other year based on the date they were hired).

3.3.3.15.5 Describe capabilities within the Solution to freeze step increases for certain periods of time or certain classifications (Ex. a school district has bargained a districtwide freeze of step increases for two years to reduce spending). .

3.3.3.15.6. Describe capabilities within the Solution to exempt specific salary ranges from the step increment process or manage different schedules for step increases (Ex. managers receive a step increase every other year while classified employees receive one each year). .

3.3.3.15.7. Describe capabilities within the Solution to stop step increases after a set amount of steps (Ex: Position A has 5 possible steps and the Solution does not allow additional steps after that).

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3.3.3.16 Describe capabilities within the Solution to support column (grade) movement based on post graduate units completed. Describe to what extent this can be customized by Participants.

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3.3.3.16.1 Describe capabilities within the Solution to limit column (grade) movement to one column per year and apply units completed to future years (Ex: Teacher A completes 20 units and is eligible to move 2 columns. One column is given for this fiscal year and a second column will be granted for the next fiscal year).

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3.3.3.16.2 Describe capabilities within the Solution to set a window of eligibility for column movement (Ex: December 1st is the deadline to submit units for the next fiscal year).

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3.3.3.17 Describe capabilities within the Solution to support retroactive adjustments to pay.

--

3.3.3.18 Describe capabilities within the Solution to support longevity pay (additional pay related to an employee's years of service).

--

3.3.3.18.1 Describe capabilities within the Solution to differentiate longevity rules by bargaining unit or job class (Ex: management, classified, and certificated all have different longevity rules).

--

3.3.3.18.2 Describe capabilities within the Solution to calculate longevity pay as either a percentage of base pay or a flat amount.

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Base Pay:

Flat Amount:

3.3.3.18.3. Describe capabilities within the Solution to support longevity pay based on years of experience in education, in the organization, and/or in the bargaining unit. Please be sure to describe the Solution's ability to store multiple longevity dates and identify the appropriate calculator based on an employee's current assignment/role (Ex: Administrators receive longevity based on years of experience in education and classified staff receive longevity based on years of experience within the district).

Years of Experience in Education:

Years in the Organization:

Years in the Bargaining Unit:

Ability to store multiple longevity dates and identify the appropriate calculator:

3.3.3.18.4 Describe capabilities within the Solution to calculate previous years of employment to longevity after a break in employment (Ex: Employee A works for School District A for 10 years, quits for a period of 2 years, and then returns to District A).

3.3.3.19 Describe how the solution supports applying and validating mass changes (Ex. contract negotiations lead to a 2% ongoing increase to all employee salaries).

****3.3.3.20 Describe how the Solution is designed to integrate with Payroll, including initial employee setup, monthly/biweekly payroll administration, changes due to salary increases or additional pay increments and calculation of payroll adjustments. ****

****3.3.3.21 Describe audit reports available in the Solution designed to identify missing information or inaccurate data from the expected payroll load and provide samples.****

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3.3.3.22 Describe capabilities within the Solution to proactively flag errors in payroll output files/reports (Ex: mismatched salary information).

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****3.3.3.23** Describe the Solution’s ability to support standardized account code structure (SACS) for the purposes of distributing payroll charges. ******

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3.3.3.24 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.3.3.25 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.3.4 Self Service

	Yes	No	P	C	Comments
**3.3.4.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.3.4.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

3.3.4.3 Please check which information Participant employees can access and update in the Solution without assistance from administrative staff. If additional fields can be updated please add them.

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	Employee Address
	Employee Personal Phone Number
	Employee Beneficiary
	Employee Work Extension
	Employee Personal Email Address
	Employee Emergency Contacts
	Other: (Please Describe)

3.3.4.4 Describe how employees can view their current information, such as current salary, demographic and contact information.

3.3.4.5 Describe capabilities within the Solution to distribute forms or other information for employees to view, verify, or attest compliance with (ie: Can the Solution email forms to employees and track completion/submission?).

3.3.4.6 Describe capabilities within the Solution to allow employees to view and print employment verification documentation(Ex: An employee needs employment verification and can select which data in the Solution they require and the Solution automatically generates employment verification).

3.3.4.7 Describe capabilities within the Solution to allow employees to upload documents for submission to Human Resources (i.e., picture for identification, TB test result, credential renewal documents).

3.4.4.8 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.4.4.9 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.4 HR Forms and Workflow

Notes Regarding Award: For this subsection, Vendors may be awarded if they meet the essential requirements in any one of the subsections. For example, a Vendor that meets all of the essential criteria for requisitions and employee changes, but does not offer a new hire packet solution, may still be eligible for award of this section.

3.4.1 Requisition

Definitions: For the purposes of this section, the term Requisition is used to describe a form to request changes to an existing **position** (such as FTE, account code, job classification) or a request to post a position as vacant for the purposes of recruitment.

	Yes	No	P	C	Comments
**3.4.1.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.4.1.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.4.1.3 Confirm that the requisition system is fully integrated with the Position Control solution defined in section 3.3. **					

****3.4.1.4 Describe and provide screenshots of the standard requisition form and associated workflows. ****

****3.4.1.5 Describe how the requisition form integrates with Position Control to validate position number/key identifier, availability, funding, and other attributes.****

3.4.1.6 Confirm whether workflows can be differentiated for different types of position requisitions. Examples might include:

- A requisition to post an existing position as vacant “as-is” may be routed for expedited approval by an HR technician due to lack of budgetary impact.
- A requisition to create a new position or make other changes that would impact the cost of the position may require additional layers of approval.

3.4.1.7 Describe how the requisition integrates with the Core HR system and other forms to determine if changes requested to a position will impact an incumbent employee.

3.4.1.7.1 Describe how the Solution supports identifying and posting vacant positions where the incumbent has not yet exited the position (Ex: An employee gives notice of upcoming resignation and the site administrator would like to begin recruitment prior to the incumbent’s last day).

3.4.1.7.2 Describe any integrations with employee change requests that would allow the submitter and approvers to view related forms (Ex. the requisition to post a position as vacant can be linked to a form for the prior incumbent’s resignation).

3.4.1.8 Describe what visibility the Solution supports for viewing related transactions for a position (ie: HR administrative user can pull up all historical position requests and employee changes related to that same position to get context during the approval process).

****3.4.1.9 Describe how requests to create new positions are entered in the Solution and what approval routing options are available.****

****3.4.1.10 Describe how the approval process can be customized within the system. Provide screenshots of the interface for Approvals.****

3.4.1.11 Describe how multiple levels of approval are supported by the Solution (Ex: a replacement position is posted with changes to FTE and approvals must be received from the site, payroll, and HR).

3.4.1.12 Describe restrictions within the Solution to prevent unauthorized users from changing details for positions (Ex: a principal attempts to change the FTE allocation for a replacement position without getting required Participant and union approval; how does the Solution prevent them from entering the change?).

3.4.1.13 Describe capabilities within the Solution to project the cost of the requested transaction/position and what administrative users can be given permission to view projected costs (ie: salary cost, insurance cost, retirement benefits, etc.).

3.4.1.13.1 Describe capabilities within the Solution for administrative users to compare position requests to specific allocations per budget number.

3.4.1.13.2 Describe capabilities within the Solution for administrative users to compare position requests to their overall budget.

3.4.1.13.3 Describe the process to check available funds for budget numbers selected for both replacement and new positions and any automated alerts available if the cost for positions exceed the balance in the applicable budget (Ex: Email to site administrator, payroll, and HR).

3.4.1.14 Describe capabilities within the Solution to clearly differentiate between existing/established positions and requests for a new position (Ex: an administrative assistant retires and a replacement is requested, which appears differently than a new administrative assistant 2 position for hire).

3.4.1.15 Describe how administrative user roles are restricted to specific employee records (ie: managers should have visibility into their employees only, HR and payroll should have access to all employees).

3.4.1.16 Describe how the Solution supports site/department administrators in viewing existing position details, including vacancies and unfilled allocations, and leveraging that information to initiate a requisition/change request.

3.4.1.17 Describe the capability of the Solution to integrate with and send position postings to Ed Join, Neo Gof, and any other State and/or County system. Please list all systems the Solution integrates with.

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3.4.1.18 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.4.1.19 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.4.2 Employee and Assignment Changes

	Yes	No	P	C	Comments
**3.4.2.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.4.2.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.4.2.3 ** Confirm the Solution offers an integrated employee/assignment change form to support requests for assignment and position changes.					

**3.4.2.4 Describe and provide screenshots of the standard employee/assignment change request form and associated workflows. **

--

****3.4.2.5** Describe how the employee/assignment change form integrates with the core human resources system to import and validate position number/key identifier, employee identifiers, assignment details,, funding, and other attributes from the Core HR System.**

****3.4.2.6** Describe the process for entering an employee/assignment change request from the perspective of a site/department administrator. **

****3.4.2.7** List all types of employee/assignment change requests supported by the form, including:

- Employee transfer to a different position
- Employee promotion
- Employee separation (include all causes of separation supported by the solution)
- Employee FTE change
- Employee reclassification/job code change
- Employee/assignment funding source change.

**

****3.4.2.8** Describe how the approval process can be customized within the system. Provide screenshots of the interface for Approvals.**

3.4.2.9 Describe how multiple levels of approval are supported by the Solution (Ex: an FTE change requires both HR approval for collective bargaining implications and Fiscal approval for budgetary implications).

3.4.2.10 Describe capabilities within the Solution to connect with the Core Human Resources System to automatically update employee and assignment information once a change request has been fully approved.

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3.4.2.11 Describe how the Solution ensures easy visibility for changes that have been requested/made for a change of status and to whom the changes are visible (ie: is the changed item highlighted or a different color text than unchanged aspects?).

--

3.4.2.12 Describe capabilities in the Solution to view historical changes or additional pending requests for the affected employee (ie: How can an administrative user view an employee's history in the Solution?). Please be sure to specify any limitations, such as the number of past assignments can be tracked per employee.

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3.4.2.13 Describe capabilities in the Solution to view historical changes for the affected position (ie: How can an administrative user view the history for a specific position in the Solution?). Please be sure to specify any limitations, such as number of employees or time period that can be tracked per position.

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3.4.2.14 Describe capabilities within the Solution to pull details from the core Human Resources/Position Control System to allow administrative users to preview how the requested changes compare to current allocations (Ex: If a site is allowed 20 teachers FTE and requests an increase).

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3.4.2.15 Describe the capabilities within the Solution for administrative users to view all pending changes for positions, employees, and/or account codes.

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3.4.2.16 Describe the capabilities within the Solution to prevent duplication of change of status requests (ie: if two administrative users submit a change of status for the same position, the changes are flagged in the Solution allowing only one change to be approved).

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3.4.2.17 Describe the capabilities within the Solution to require differentiated information based on the type of position (Ex: FTE is not required for a substitute position).

3.4.2.18 Describe the capabilities within the Solution to require notes/explanations for requested changes of status.

3.4.2.19 Describe any capabilities within the Solution to restrict administrative users to specific budget numbers when entering changes of status (ie: prevent a site from inadvertently using another site's budget).

3.4.2.20 Describe capabilities within the Solution to validate budget codes (ie: are object codes matched by classification? Is permission from the budget manager required?).

3.4.2.21 Describe capabilities within the Solution to project the cost of the requested change of status and what administrative users can be given permission to view projected costs (ie: salary cost, insurance cost, retirement benefits, etc.).

3.4.2.21.1 Describe capabilities within the Solution for administrative users to compare change of status requests to specific allocations per budget number.

3.4.2.21.2 Describe capabilities within the Solution for administrative users to compare change of status requests to their overall budget.

3.4.2.22 Describe capabilities within the Solution to support a workflow revisions and resubmission to the form (Ex. Fiscal would like the site administrator to reduce the FTE request to not exceed a budget allocation).

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3.4.2.23 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.4.2.24 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.4.3 New Hire Processing

	Yes	No	P	C	Comments
**3.4.3.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.4.3.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.4.3.3 ** Confirm that the Solution offers an integrated online form to facilitate hiring new employees.					

3.4.3.4 Provide an overview of the capabilities of the Solution to support pre-hire processing of job applicants after candidate selection

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3.4.3.5 Describe the capabilities of the Solution to integrate with candidate application systems to import candidate demographic and work experience information. List Solutions with pre-built integrations and/or describe file formats for importing candidate data.

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3.4.3.6 Check which information can be entered for new hires. Add additional fields for additional information available in the Solution.

	Employee Identity Information (i.e., Social Security and Drivers License)
	Employee Demographic and Contact Information
	Emergency Contact
	Tax Forms
	Training Verification
	Tuberculosis Tests
	Other (please describe):

3.4.3.7 Please clarify if customized new hire forms and data fields can be configured in the system to collect organization-specific new-hire data. If customized forms are available, include screenshots of the form design process.

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3.4.3.8 Confirm whether the Solution has capabilities to upload a PDF or other document for electronic signature by the candidate (i.e., job description, union election form, acceptable use policies, retirement elections). Describe the electronic signature process within the Solution.

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3.4.3.9 Confirm whether the Solution can import teacher credential information directly from the California Commission on Teacher Credentialing (CCTC).

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3.4.3.10 Describe the capabilities and process for administrative users to review and approve new hire information prior to importing to the core Human Resources Solution.

3.4.3.11 Describe the workflow and communications embedded in the Solution to keep both the candidate and hiring manager informed of various steps in the hiring process.

3.4.3.12 Describe automated communications in the Solution to notify the candidate of any outstanding required information (Ex: Candidate has not submitted their TB tests and the Solution automatically generates an email to remind them).

3.4.3.13 Describe capabilities within the Solution to modify/add new requirements to the hiring process and customize the workflow and forms. Please be sure to include any limitation to the number of requirements, etc.

3.4.3.14 Describe the capabilities of the Solution to automatically validate data at the point of entry (ie: verify that social security number is correct, ensure proper case, search for and automatically notify candidate of missing information, verify correct email format).

3.4.3.15 Describe capabilities within the Solution to selectively print selected sections of candidate applications and to set a summary of information for printing (ie: a default printing option is set to print only certain information).

3.4.3.16 Describe capabilities within the Solution to check for duplicate employees (ie: If an applicant has previously worked for Participant the Solution will verify the number and social security number). Please describe how the Solution handles duplicate employees (is the

administrative user notified? Does the Solution prevent a duplicate entry? Does the new entry override the previous entry?).

3.4.3.17 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

3.4.3.18 Please also provide a brief description of planned future development that may be beneficial to Participants.

3.4.4 Other Forms

	Yes	No	P	C	Comments
**3.4.4.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.4.4.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					

3.4.4.3 Describe capabilities within the Solution to automate compliance monitoring tasks (ie: the Solution monitors Tuberculosis test dates, annual training completion, certificates, etc). Please describe how the status is visible for administrative users in the Solution.

3.4.4.4 Describe automated communications in the Solution to notify employees of upcoming required tasks (Ex: The Solution automatically generates an email to employees 2 months prior to the expiration date of their TB tests).

3.4.4.5 Describe the integration with the California Commission on Teacher Credentialing to check for expired and renewed credentials. Please be sure to describe how the information is presented to administrative users and any automated communications to employees and administrative users.

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3.4.4.6 Check which forms can be created and/or customized in the Solution. Please add additional fields for any additional forms.

	Leave of absences
	Temporary teacher contracts
	Employee observations and evaluations
	Reasonable Insurance Letters (including verifiable proof that notice was sent and records of receipt)

3.4.4.7 Please describe *how* forms can be created and/or customized and any limitations.

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3.4.4.8 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.4.4.9 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.5 Additional Pay and Stipends

Definitions: Additional pay and stipends include both ongoing additions to employees' compensation (longevity, advanced degree bonuses) and one-time payments for additional work (overtime, additional hours, teacher stipends for additional duties).

	Yes	No	P	C	Comments
**3.5.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.5.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
**3.5.3 ** Confirm the Solution can support multiple additional pay lines above employees' base salaries within the system.					

****3.5.4** Describe capabilities within the Solution to manage multiple additional pay options and how additional pay can be attached to employee records. ******

****3.5.5** Describe all methods for calculating and adding ongoing additional pay items to employee compensation such as longevity pay and/or mileage stipends, including establishing fixed/flat amounts, hourly/daily amounts, percentage based increments, or other options ******

****3.5.6** Describe the process for an administrator to request one-time additional pay for an employee, including additional hours, overtime, and fixed stipends for additional work out-of-scope of the employee's classification ******

3.5.7 Describe capabilities within the Solution to notify managers and administrative users if an employee works additional hours for a certain number of days. Describe the notification process and content.

3.5.8 Describe how additional pay can be set up/entered for one-time additional payments: fixed daily rate, fixed hourly rate, employee’s hourly rate, employee’s daily rate, employee’s overtime rate, our-of-class pay (rate based on a specific salary grade that is not the employee’s traditional pay), or percentage. Please be sure to clarify how multiple additional pay types can be set up for these different types of pay.

Fixed Daily Rate:

Fixed Hourly Rate:

Employee’s Hourly Rate:

Employee’s Daily Rate:

Employee’s Overtime Rate:

Out-Of-Class Pay:

Percentage:

Multiple Additional Pay Types:

3.5.9 Describe capabilities within the Solution to pay employees working out of class (Ex: an Office Assistant substitutes for an Administrative Assistant to the Principal at a higher pay range). Please be clear if this would be automatically calculated by the Solution or if Participant employees would need to manually calculate pay.

3.5.10 Describe capabilities within the Solution to attach additional pay to the employee or the position (Ex. School administrative assistants (AA) (1) Each AA receives an individual stipend based on their years of service based on their experience (stipend based on the employee), (2) AAs also receive a stipend based on the size of school they are (stipend based on the position/work location).

3.5.11 Describe capabilities within the Solution to set up some additional pay defaults associated with positions or classifications (Ex: everyone in a specific job code receives a monthly mileage and cell phone allowance).

3.5.12 Describe capabilities within the Solution to establish one-time and recurring payments.

3.5.13 Describe capabilities within the Solution to collect specific days and hours worked for additional pay related to overtime and extra hours beyond the work day. Please be clear about how frequently and how days and hours are entered.

3.5.14 Describe capabilities within the Solution to *include* additional pay types that should be included in the rate calculated for a stipend (Ex: longevity pay should be included in the overtime calculation or employee hourly/daily rate).

3.5.14.1 Describe capabilities within the Solution to *exclude* additional pay types that should be included in the rate calculated for a stipend (Ex: longevity pay should be included in the overtime calculation or employee hourly/daily rate).

3.5.15 Describe capabilities within the Solution to efficiently enter multiple stipends for employees receiving a stipend for the same activity/justification (Ex: 200 teachers attend the same after school training). Please clarify if the same notes can be applied to all applicable stipends.

3.5.16 Describe capabilities within the Solution to adjust stipend rates based on the effective date of assignment changes (Ex: An Office Assistant works overtime and later gets promoted to an Administrative Assistant to the Principal. They then enter their overtime which was

earned as an Office Assistant. The overtime stipend should be calculated based on the previous pay range as an Office Assistant).

3.5.17 Describe capabilities within the Solution to automatically calculate retroactive and prospective adjustments to stipends based on a pay rate change (Ex 1: A pay rate increase is approved in October retroactive to July and all stipends starting in July need to be adjusted based on the new pay rates for employees. Ex 2: A pay rate increase is approved in October retroactive to July and all stipends starting in October need to be adjusted based on the new pay rates for employees.).

Retroactive:

Prospective:

3.5.18 Describe capabilities within the Solution to pull specific hourly and daily rates from employee's assignments for the purposes of calculating employee stipend rates.

3.5.19 Describe capabilities within the Solution to calculate total stipend costs at the point of entry.

3.5.20 Describe any alerts within the Solution based on additional pay thresholds (i.e. limits to overtime earned in one week).

3.5.21 Describe capabilities within the stipend module to integrate directly with Payroll.

3.5.22 Describe capabilities within the Solution to define valid budget account codes, automatically populate, and to restrict usage by stipend and/or employee type (ie: prevent sites from inadvertently using another site's budget).

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3.5.22.1 Describe capabilities within the Solution to automatically project the impact of stipends on a budget.

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3.5.23 Describe capabilities within the Solution to automatically incorporate:

Check if an employee is in active status	
Validate pay rate and pay dates for an employee	
Validate account codes	

3.5.24 Describe how the stipend module integrates with and pulls data from the work calendars module (or outside solutions that track work calendars).

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3.5.24.1 Describe capabilities within the Solution to validate extra hours entered against an employee's work calendar to determine overtime eligibility and the ability to prevent double pay (Ex: An employee is scheduled to work 9:00 - 2:00 and enters a stipend for working 1:00 - 4:00 to cover for another employee. Does the Solution flag and/or prevent a stipend for the 1:00 - 2:00 time worked?).

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3.5.24.2 Describe capabilities within the Solution to automatically check stipends against employee absences (Ex: A teacher receives a recurring stipend for extra work as a department chair, however the teacher takes an extended absence on maternity leave. Does the Solution automatically flag the stipend sent to pay while the teacher is on leave?). If a

stipend is entered when an employee is absent, describe the notification process, who is notified, and the content.

3.5.25 Describe capabilities within the Solution to automatically determine if a requested stipend is for overtime or extra hours based on an employee's work hours (Ex: An employee who typically works 24 hours a week works 5 extra hours and should be paid their regular hourly rate). Please also describe the ability for administrative users to override the Solution and adjust rates.

3.5.26 Describe capabilities within the Solution to check for conflicts between stipends and identify when an employee has had multiple stipends submitted for the same day (Ex: A principal and department administrator both enter stipends for the same employees who attended a training). Please be clear who the Solution notifies, how and what is communicated (ie: Is an email sent to those who entered the stipend? Does a warning flash on the screen for administrative users? Is payroll notified?).

3.5.26.1 Describe capabilities within the Solution to override any preventions from employees earning multiple stipends in one day (Ex: An employee attends an after school training from 3:00 - 4:00 and another from 6:00 - 7:00).

3.5.27 Describe capabilities within the Solution to provide autofill and/or drop down texts for typically stipend justifications. If these are pre-set in the Solution please include a list of justifications, if not please describe how administrative users can enter justifications and any limit to the number.

3.5.27.1 Describe capabilities within the Solution to limit which typical justifications are visible to different classes of employees and administrative users.

3.5.28 Describe capabilities within the Solution to support a multiple step approval process (Ex: stipends are approved by the site budget manager, then routed to and approved by HR, then routed to and approved by Payroll).

3.5.29 Describe capabilities within the Solution to define the workflow/routing for stipend approval by employee type, employee last name, job code, or site (ie: Certificates stipends are approved by a different administrative user than Classified stipends).

3.5.30 Describe capabilities within the Solution to automatically flag certain stipend justifications and/or classes of employees (Ex: Flag all stipends for administrators). Please be clear who the Solution notifies, how and what is communicated.

3.5.31 Describe capabilities within the Solution to define thresholds to notify HR and/or Payroll when employees meet a certain threshold of continuing additional hours (Ex: A classified employee that has worked extra hours for more than 10 work days). Please be clear who the Solution notifies, how and what is communicated.

3.5.32 Describe capabilities within the Solution to define thresholds to notify HR and/or Payroll when employees meet a certain threshold of number of hours in a day and/or week (ie: A classified employee enters a 80 hour work week). Please be clear who the Solution notifies, how and what is communicated.

3.5.33 Describe capabilities within the Solution to set employee or site-based limits on certain types of additional pay (ie: grading days for large classes are limited to three days per year per employee).

3.5.34 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.5.35 Please also provide a brief description of planned future development that may be beneficial to Participants.

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3.6 Reporting

	Yes	No	P	C	Comments
**3.6.1 ** Confirm that the Solution offers intuitive navigation with minimal training needed. **					
**3.6.2 ** Confirm that the Solution offers efficient navigation with minimal clicking required to complete key tasks. **					
*3.6.3 Confirm that reports can be generated at any time without interruption of other operations and system functions.**					
3.6.4 Confirm that reports can automatically run at predetermined times and on predetermined schedules.					
3.6.5 Confirm that the Solution retains and maintains multi-year historical data.					
3.6.6 Confirm that the Solution allows administrative users to run pre-built reports on a variety of information including attendance records for substitutes and staff.					
3.6.7 Confirm that reports are available both online and printed.					

3.6.8 Confirm that custom report writer/data extract utility is available.

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****3.6.9 List all standard reports available in the Solution and provide samples. ****

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3.6.10 Describe what access administrative users have to the database for importing into a data warehouse/analytics tool (Full access is preferred).

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3.6.11 Describe the Solution's ad hoc reporting and capabilities, including what access is available to all fields/data in the Solution for creating customized reports and queries.

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3.6.11.1 Describe the Solution's ability to save customized reports as templates for future use.

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3.6.11.2 Describe capabilities within the Solution for administrative users to create and schedule recurring reports (ie: monthly report of employees with upcoming credential expiration).

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3.6.11.3 Describe capabilities within the Solution for administrative users to create and schedule recurring reports by email, apply appropriate security to the reports (ie: Send all administrators a list of employees with upcoming or overdue evaluation deadlines each month).

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3.6.12 Describe reports available in the Solution that allow administrative users to audit vacant positions, including how they can be sorted (ie: by employee, by position, etc.).

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3.6.13 Describe reports available in the Solution that relate to FTE, budgets, and employee assignments (Ex: Compare employee assigned site and site budget).

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3.6.14 Describe attrition analysis reports available in the Solution that show how long positions stay open, how quickly they are filled, and other patterns. Describe if they can be sorted by position, by site, and other criteria they can be sorted by.

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3.6.15 Describe custom reporting capabilities within the Solution. Be sure to include any limitations to fields, number of fields etc.

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3.6.17 Describe reports available in the Solution related to auditing credentials and other compliance items for employees.

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3.6.18 Describe reports available in the Solution to audit discrepancies between Payroll and HR data.

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3.6.19 Describe the extent to which individual security levels can be dynamically/automatically reflected in reports and queries (Ex. an HR administrator creates a staff roster report that, (1) when run by HR personnel shows all employees in the district, and (2) when run by a site administrator, shows only employees at their site/department.

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3.6.20 Describe reports available to site managers related to staffing and budgeting. Please add additional reports available.

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All positions assigned to that manager/site	
All vacant positions assigned the that manager/site	
Discrepancies between positions and allocations	
Upcoming/Overdue/Recent evaluations	
Probationary period expiration dates	

3.6.21 Please describe any additional functionality available as part of the core/proposed Solution or as an optional solution that is available for purchase at an additional cost to the Participant. Please also provide a brief description of planned development that may be of benefit to Participants.

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3.6.22 Please also provide a brief description of planned future development that may be beneficial to Participants.

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Part 4 Price

Vendor must complete the Pricing Forms (Appendix C). In Appendix C, Vendor shall detail all costs associated with the proposed Solution, including, but not limited to, the implementation, software licensing and maintenance, training, ongoing support, recommended professional services, taxes and surcharges, and costs of optional services and products. Taxes may be listed as an approximate percentage where appropriate. Costs not identified by Vendor shall be borne by Vendor and will not alter the requirements identified in this solicitation.

	Yes	No	Comments
4.1 Confirm that all costs, including, but not limited to, implementation, software licensing and maintenance, training, ongoing support, recommended professional services, taxes and surcharges, and costs of optional services and products and any other anticipated costs to the Participant have been included on the completed Appendix C: Pricing Form. **			
4.2 Confirm that should the Solution be down or performance degraded to render the Solution unusable for longer than 30 minutes (outside of a scheduled maintenance window), Vendor shall refund the portion of the contract equivalent to that outage window.			
4.3 Confirm that the Pricing Form includes an itemized schedule of all equipment and software for the proposed Solution and all pricing quoted includes all activities necessary for a complete, turn-key system. **			

****4.4**** Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs. ******

****4.5**** Provide a narrative explanation of the pricing proposal. Describe in detail any limitations of (e.g., length of term, service quantities) that apply to the proposed pricing. Note, limitations or terms that are unfavorable may be cause for rejection of the Proposal. ******

****4.6**** Ed Tech JPA reserves the right to award to multiple Vendors a Master Agreement to best meet the needs of its Associate Members. If pricing is contingent upon a specific volume of students or staff, explicitly state those conditions. ******

4.7 Describe how growth and site changes will impact the price.

4.8 Describe how declining enrollment and site changes will impact the price.

****4.9**** The maintenance and licensing fee shall not begin until the Solution has been tested and accepted by the Participant. Describe payment milestones and expectations. ******

Part 5 Exceptions

Describe any exceptions to the RFP content, general expectations, specific requirements, and/or the Ed TEch JPA's standard Master Agreement and Purchase Agreement. For each exception, propose acceptable alternative language and/or provide rationale to support the exception.

*** End of Proposal Form ***