Information Technology Services (ITS)

What is required for a Request for Proposal solicitation?

August 2023

What is an RFP?

❖ RFP stands for Request for Proposal

➢ Formal solicitation process for professional services involving Individuals or firms that provide temporary special services in areas such as finance, engineering, architect, technical, etc.
■ i.e. Staff Augmentation, IT Project Planning, System Implementations, Managed Services, etc.

➢ Award is based on a combination of evaluation criteria such as experience, technical expertise and pricing.

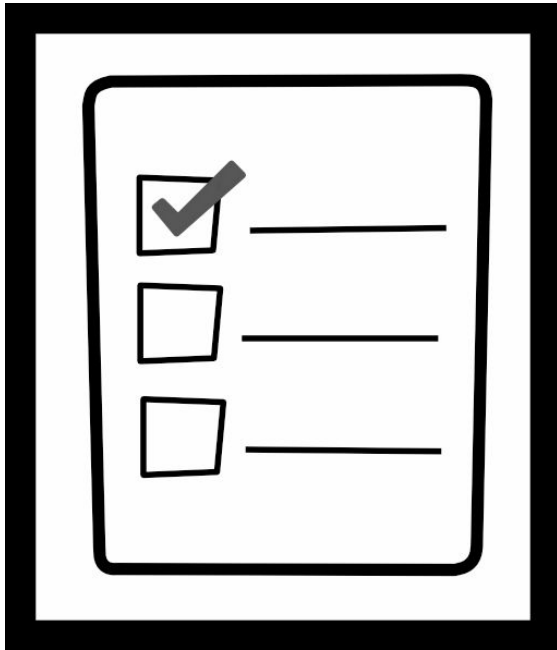➢ Recommendations are usually made by a committee instead of an individual

Why an RFP?

❖ Procuring professional services or technology, and price is not the sole determining factor

❖ Allows flexibility in evaluation through weighted criteria

❖ Allows District to acquire innovative solutions which leverage the expertise of the supplier community

Components of an RFP?

➢ What documents do you need?

■ Minimum Qualifications

■ Evaluation Criteria

■ Submittal Requirements

■ Statement of Work

■ Pricing Requirements

MINIMUM QUALIFICATIONS

Minimum Qualifications

➢ Clearly identifies the required knowledge, skills, experience and abilities that must be possessed by the proposer/resource
  ■ How many years of experience
  ■ What types of licenses and/or certifications
  ■ Unique/special District requirements
  ■ Aligns with industry standards/best practices
➢ Scored as either "Pass" or "Fail"
➢ Ensures that only "qualified" firms/resources move forward in the evaluation process

Minimum Qualifications

❖ Examples

PHASE I - MINIMUM QUALIFICATIONS – Pass/Fail

Proposers shall meet the minimum qualifications requirements **at the time of proposal submittal**. Proposer shall specify how compliance was achieved for each of the Minimum Qualification requirements listed below. Failure to provide information how compliance was achieved for each specific requirement will be deemed non-responsive to this RFP and no further consideration shall be granted.

MINIMUM QUALIFICATIONS

1. Proposer must have a minimum of five years of experience in planning, managing, and coordinating large-scale (greater than $25M) technology programs and initiatives.

2. Proposer must have recent experience (within the last 2 years) providing Program/Project Management consulting services to large (50,000 students or above) K-12 organizations.

3. The proposed Program Manager must have a minimum of five years of experience in the area of Cybersecurity Program Management.

   For the purposes of this initiative, Cybersecurity is defined as, but not limited to:
   The management of programs that intend to improve threat detection, threat response, threat avoidance, information protection, controlled information access, and other industry best practices.

PHASE I - MINIMUM QUALIFICATIONS – Pass/Fail

Proposers shall meet the minimum qualifications requirements **at the time of proposal submittal**. Proposer shall specify how compliance was achieved for each of the Minimum Qualification requirements listed below. Failure to provide information how compliance was achieved for each specific requirement will be deemed non-responsive to this RFP and no further consideration shall be granted.

MINIMUM QUALIFICATIONS

1. The proposer must have a minimum of five (5) years professional experience in deploying Identity Management solutions similar in nature and scope to what is described in the Statement of Work.

2. The proposer must have professional experience in deploying Identity Management solutions with a user base of at least 200,000 for a single customer, such as a large agency or School District

3. The proposer's solution must scale to high loads (minimum 5,000 students enrolling per hour at semester start, with accounts provisioned within one hour).

Minimum Qualifications

❖ Examples

PHASE I - MINIMUM QUALIFICATIONS – Pass/Fail

Proposers shall meet the minimum qualifications requirements <u>at the time of proposal submittal</u>. Proposer shall **specify how compliance was achieved** for each of the Minimum Qualification requirements listed below and if applicable submit documentation for evidence of such compliance. Failure to provide information how compliance was achieved for each specific requirement shall be deemed non-responsive to this RFP and no further consideration shall be granted.

1. Proposer must have been continuously in business providing service as specified in the Statement of Work for at least three (3) years.

2. Proposed project manager must have a minimum experience of three (3) years working with student information system implementation life cycle. Implementation life cycle is defined from project start to project go live stabilization inclusively.

3. Proposer and/or its subcontractors/partner must have a minimum of two (2) years' experience in developing and implementing student information system to a school district and/or university, serving no less than 10 schools or 30,000 students.

4. Proposer shall have a client base of a minimum of three (3) clients, whereby Proposer successfully implemented the software described. The referenced clients must reside in the United States of America.

PHASE I - MINIMUM QUALIFICATIONS – Pass/Fail

Proposers shall meet the minimum qualifications requirements at the time of proposal submittal. Proposer shall specify how compliance was achieved for each of the Minimum Qualification requirements listed below for each applicable module. Proposer to indicate Module No. and description in submittal.

Module I: Special Education Data Management System (SEDM)
Module II: Student Medical Services Management System (SMSM)

Failure to provide information on how compliance was achieved for each specific requirement will be deemed non-responsive to this RFP and no further consideration shall be granted.

1. The proposer must have a minimum of five (5) years of experience developing and implementing a Special Education Data Management System (SEDM) and/or Student Medical Services Management System (SMSM).

2. The proposed Project Manager must have a minimum of three (3) years of experience implementing a Special Education Data Management System (SEDM) and/or Student Medical Services Management System (SMSM).

3. The proposer must complete and submit the LAUSD Unified Digital Instructional Procurement Plan (UDIPP) application. For more information, please visit https://udipp.lausd.net/

EVALUATION CRITERIA

Evaluation Criteria

➢ Provides transparency and articulates the factors to be considered during the evaluation process

➢ Used to assess what a proposer can bring to the table and how well their proposal meets your goals, budget, and service requirements

➢ Provides a scoring metric/weights/important areas/sections including District-mandated items
  ■ Small Business Participation
  ■ Work-based Learning Partnership Plan

➢ Should not show bias or preference to incumbent vendors; must be fair and equitable to all parties involved

Evaluation Criteria

❖ Examples

PHASE II - EVALUATION CRITERIA

Proposals that meet the Phase I Minimum Qualification Requirements will be evaluated based on the Phase II evaluation criteria herein.

Evaluation Criteria:	Points
A. Qualifications and Experience of Firm	20
B. Qualifications and Experience of Proposed Personnel	20
C. Engagement and Service Delivery Plan	25
D. Price Proposal	25
E. Small Business Enterprise (SBE) Participation	5
F. Work-Based Learning Partnership (WBLP) Plan	5
Total Possible Points:	**100**

PHASE II - EVALUATION CRITERIA

Proposals that meet the Phase I Minimum Qualification Requirements will be evaluated based on the Phase II evaluation criteria herein.

Evaluation Criteria:	Points
A. Experience and Qualifications of Firm and Resources	15
B. Technical Solution/Product	25
C. Implementation/ Project Approach	25
D. Cost/Price Proposal	25
E. Small Business Enterprise (SBE) Participation	5
F. Work-Based Learning Partnership (WBLP) Plan	5
Total Possible Points:	**100**

Evaluation Criteria

❖ Examples

PHASE II - EVALUATION CRITERIA: Proposals that meet the Phase I Minimum Qualification Requirements will be evaluated based on the Phase II evaluation criteria herein.

Evaluation Criteria:		Points
A.	Experience, Past Performance, Qualification and Training	20 Points
B.	Solution Meets Functional Requirements and Expectations	25 Points
C.	Technical Solution/Project Approach	20 Points
D.	Work Based Learning Partnership (WBLP) Plan	5 Points
E.	Small Business Enterprise (SBE) Participation	5 Points
F.	Price/Cost Proposal	25 Points
	Total Phase II Points:	**100 Points**

PHASE II - EVALUATION CRITERIA

The proposer will be evaluated on the following criteria:

Evaluation Criteria:	Points
A. Experience and Qualifications of Firm	10
B. Experience and Qualifications of Proposed Personnel	10
C. Technical Evaluation/Project Approach	35
D. Price Proposal	35
E. Small Business Enterprise (SBE) Participation	5
F. Work-Based Learning Partnership (WBLP) Plan	5
Total Possible Points:	**100**

SUBMITTAL REQUIREMENT

Submittal Requirements

➢ Must be clear and directly tied to the evaluation criteria and statement of work requirements
➢ Opportunity for the proposer to show:
  ■ how they meet requirements,
  ■ show vendor skills and qualifications, as well s, strong past performance doing similar work
  ■ what budget they can offer,
➢ Can be a submitted as a long narrative or a checklist or short answer responses in a questionnaire format

Submittal Requirements

➢ Includes providing:
- ■ Resumes and organizational charts
- ■ Project timelines, schedules and Gantt charts
- ■ Technical and functional responses
- ■ Other plans i.e. security, rollout, training, etc.

Submittal Requirements

❖ Submittal Requirement *(Examples)*

C. EXPERIENCE AND QUALIFICATIONS OF FIRM

The Proposer shall submit a qualification statement by addressing the firm's record of successful experience and qualifications to perform the types of services required by the Statement of Work. The qualification statement should address the following:

1. Describe the proposer's professional experience in successfully performing the following key areas as delineated in the SOW:
   a. Account Lifecycle Management
   b. Application Roles, Access and Authorization Management
   c. Approval Workflows for resource access
   d. Password Management
   e. Identity Governance and Administration
   f. Integration with relevant source and target systems (e.g. HR, SIS, directories)

2. Describe the proposer's professional experience, professional capacity, and support in successfully delivering IdM solutions to institutions of similar size and complexity as the Los Angeles Unified School District.

3. Provide proposed resources resume describing relevant skills, technical expertise, experience and certifications. Provide copies of the relevant certifications.

4. Provide details of the three (3) references for which proposer provided IdM solutions. References must be for customers with objectives/requirements similar to those of LAUSD. The reference information shall include, at a minimum, the following information: name of firm, contact person, address, and specific service provided, contract number, name of the project, period of performance, phone number, e-mail address, and fax number. Discuss if the deliverables were completed on time and within budget. LAUSD reserves the right to contact these references and discuss the client's level of satisfaction with the vendor.

Submittal Requirements

❖ Examples

D. TECHNICAL SOLUTION/ PRODUCT

The Proposer shall submit a qualification statement addressing the following:

1. Describe the proposer's technical solution and recommended product's compliance to all elements in the Statement of Work (SOW), technical specifications and function requirements including the following criteria(s):
    - Overall complexity
    - Support for existing District systems and objectives
    - Adherence to the needs of the District's different populations
    - Security mechanisms and adherence to industry best practices

2. Describe how your recommended product meets all technical specifications and requirements by completing Section 3-Solution Requirements in the SOW.

Submittal Requirements

❖ Examples

E. IMPLEMENTATION SERVICE/ PROJECT APPROACH

Proposer shall provide a comprehensive and detailed approach in performing the services as specified in the SOW. The work plan shall include the following information and address all the elements in the SOW

- Task Level – The plan shall include all activities necessary for a successful project down to the task level. No task can exceed more than 160 hours of the work plan. The plan should identify whether Proposer will be performing services as requested in the Statement of Work or if they are proposing an alternate means to satisfy the requirement.
- Identify All Resources – The plan shall clearly identify all Proposer resources (including subcontractors) and District resources required to successfully complete the project. Provide job descriptions and the number of personnel assigned to tasks supporting the project.
- Deliverables – Describe the deliverables of each task.
- Timelines – Describe the timeline of each task.
- Plan Progress Charts – The plan shall include appropriate progress/Gantt charts that reflect the proposed schedule and all major milestones. A sample project plan using Microsoft Project shall be submitted in PDF format.

Submittal Requirements

❖ Examples

3. SOLUTION REQUIREMENTS

Proposers shall indicate the compliance to each requirement by completing the table below:

Requirement:	Meets Requirement?	Proposer Response:
The ability for real-time lifecycle management of accounts (onboarding/provisioning and off boarding/deprovisioning)	Yes ☐ No ☐	
The ability to process user information from multiple Human Resource (HR) and Student Information System (SIS) sources using API in real-time	Yes ☐ No ☐	
The capability for multiple environments (e.g. Dev, Test and Prod)	Yes ☐ No ☐	
The capability of processing different user populations (e.g. students, employees, contractors) in parallel	Yes ☐ No ☐	
Modern authentication security features, including Multi-Factor Authentication (MFA)	Yes ☐ No ☐	
A mechanism to prevent suspicious and malicious activities and the ability to use conditional and adaptive security controls (e.g. excessive reset attempts, take into consideration the device, network, time of the day, usage patterns, etc.)	Yes ☐ No ☐	

STATEMENT OF WORK

Statement of Work

➢ A SOW should be drafted in clear, simple, and concise statements

➢ All requirements should be described in sufficient detail to assure clarity.

➢ There should never be a question as to what work is to be completed, or what the contractor is obligated to do – nothing should be implied.

➢ Every effort should be made to avoid being ambiguous.

➢ Requirements should be clearly stated to easily determine compliance to the contract.

Statement of Work

❖ **Components of a Statement of Work**
1. A general statement of the scope or extent of the work to be performed.
2. The period of performance of the work.
3. The place for performance of the work.
4. Reference documents, procedures, or specifications governing the work to be performed.

Statement of Work

5. The specific work requirements:

    a. A detailed statement of the purpose, objective or goals to be undertaken by the vendor
    b. The job classification or approximate skill level of the personnel
    c. All significant data deliverables
    d. All materials to be developed by the vendor and delivered to the District
    e. An estimated time schedule for the provisioning of these services by the vendor.
    f. Completion and Acceptance criteria for the work to be performed.

Statement of Work

6. Management or administrative requirements of the work.

7. Compliance or Progress Reporting requirements.

8. Contract Completion or Close-out requirements.

Sample Statement of Work

A. GENERAL

The Los Angeles Unified School District seeks qualified proposers to provide Technical Architecture Services for the Information Technology Division. LAUSD intends to use the results of this solicitation process to award a work order to the responsive and responsible proposer. The proposed work order will require one (1) resource on-site.

B. REQUIREMENTS

a. Proven experience as an Enterprise Architect
b. Experience with multiple database management systems
c. Experience with API management
d. Experience with Cloud hosting and infrastructure
e. In-depth knowledge of strategic IT solutions
f. Familiarity with various operating systems and databases
g. Experience in cloud technologies (e.g. VMware, Core, Containers)
h. Hands-on experience with software development and system administration
i. Experience in project management and service-oriented architecture (SOA)
j. Effective communication and listening skills – experience with clients/operational managers
k. Strong problem-solving skills and providing answers
l. Organizational and leadership skills
m. Knowledge of quality standards, legislation, and best practices
n. Knowledge of selected coding languages (e.g. JavaScript, Java, .NET)
o. BS/BA in Computer Science, Engineering or a related field.

C. DELIVERABLES

The proposed resource shall perform the duties as listed above. Additionally, daily, monthly, quarterly, and/or annual reports must be provided as requested by the District. Training and/or knowledge transfer shall be provided at the request of the District. The resource shall complete and submit the following deliverables:

a. Design functional technology solutions
b. Identify organizational needs to define system specifications
c. Oversee the development and implementation of programs
d. Provide technical leadership and support to software development teams
e. Plan and design the structure of a technology solution
f. Communicate system requirements to software development teams
g. Evaluate and select appropriate software or hardware and suggest integration methods
h. Oversee assigned programs (e.g. conduct code review) and provide guidance to team members
i. Ensure the implementation of agreed architecture and infrastructure
j. Address technical concerns, ideas, and suggestions, solving technical problems when they arise
k. Monitor systems to ensure they meet both user needs and business goals.

Sample Statement of Work

D. WORK SCHEDULE

The resource shall be available to begin work upon full execution of the agreement. Standard work hours will be Monday thru Friday between 8:30 AM to 5:00 PM (Pacific Time) unless other arrangements are mutually agreed upon. The actual schedule may be adjusted based on project needs by the sponsor.

E. OTHERS

For the duration of the project, the proposed firm and/or resource are expected to bring their own laptop computer equipped with appropriate tools such as Microsoft Word, Excel, SharePoint, etc.

A performance review will be conducted by the District to ensure services are performed satisfactorily by the Contractor and its resource. Contractor will be notified by the District of their performance. If the review is unsatisfactory, the contractor will be required to submit a corrective action plan to address the deficiencies. If the performance is not improved, the contract will not be renewed, and the option years will not be exercised.

Sample Statement of Work

STATEMENT OF WORK

LAUSD is soliciting qualified service Providers, (hereafter referred to as "Provider", "Vendor" or "Contractor") for one solution. Under this solution, the Provider shall submit a proposal for implementation and ongoing services for a professional learning management platform. LAUSD priorities include but are not limited to:

- The system integrates with current LAUSD data and systems.
- The company provides timely and responsive support and training.
- The system must offer 24-hour access; be both web-based and accessible via a variety of mobile devices; utilize e-mail.
- Solution must be externally hosted (e.g., SaaS)

I. KEY FUNCTIONAL AND TECHNICAL REQUIREMENTS

The Contractor shall provide a web-based software solution for professional learning management that includes, at a minimum, the following:

Indicate if your firm has a solution for the platform feature listed in the table below. If yes, please provide this information as part of the Statement of Work. If no, please indicate which feature(s) your firm is unable to provide.

Platform Required/Desired Features	Yes	No	Comments
A. User Experience/Interface			
Platform navigation is easy to use with minimal clicks, information is rendered on a single page, and loads quickly.			
Compatible with a variety of operating systems, internet browsers, and mobile devices.			
Allows for District personalization, including branding and application settings.			
Search tool allows for the selection of multiple criteria within a single search.			
Search tool allows for data to be filtered based on individual preferences.			
Search tool allows for all fields within the system to be searchable.			
Search tool allows for customized default settings.			
Search tool allows for courses and resources to be searchable.			

Sample Statement of Work

Program Operating Costs	Total Program Cost
A. Personnel Expenses	
Position/Title	
	$
	$
	$
	$
Totals:	$
B. Equipment	
Item/Purpose	
	$
	$
	$
	$
Totals:	$
C. Supplies	
Item	
	$
	$
	$
	$
Totals:	$
D. Staff Training	
Purpose	
	$
	$
	$
Totals:	$
E. Contractual and Consultant Services	
Purpose	
	$
	$
	$
Totals:	$

PRICING REQUIREMENTS

Pricing Requirements

❖ Pricing Requirement

➢ Includes pricing instructions on how to structure of pricing components

➢ Standardizes pricing submittals for an even comparison amongst the vendors

➢ Allows District to gauge "reasonableness" and "realism" of submitting pricing

➢ District can develop negotiation strategies to target pricing reductions

Pricing Requirements

❖ Examples

The purpose of this form is to provide a standard format by which the Proposer submits its price proposal. The fully burdened hourly rate should be inclusive of direct labor cost, overhead, general and administrative (G&A), travel expenses, profit, shipping, packaging, and insurance cost. No travel or parking expenses will be provided to the Contractor. Submit one rate schedule sheet for each proposed resource.

Resource Name	Labor Classification*	Role	Fully Burdened Rate
_____	_____	Enterprise Architect	$_____

*Please provide the labor classification that apparently matches the required role.

The purpose of this form is to provide a standard format by which the Proposer submits its price proposal. The fully burdened hourly rate should be inclusive of direct labor cost, overhead, general and administrative (G&A), travel expenses, profit, shipping, packaging, and insurance cost. No travel or parking expenses will be provided to the Contractor. Submit one rate schedule sheet for each proposed resource.

Resource Name	Labor Classification*	Role	Fully Burdened Rate
_____	Business Analyst, Level II	Senior Business Analyst (ISTAR)	$_____

The purpose of this form is to provide a standard format by which the Proposer submits its price proposal. The fully burdened hourly rate should be inclusive of direct labor cost, overhead, general and administrative (G&A), travel expenses, profit, shipping, packaging, and insurance cost. No travel or parking expenses will be provided to the Contractor. Submit one rate schedule sheet for each proposed resource.

Payment shall be made upon the District's staff review and acceptance of each deliverable.

Name	Description	Fully Burdened Rate
Deliverable 1	ASSESSMENT OF LAUSD COMMUNICATION SYSTEMS	$_____
Deliverable 2	COMMUNICATION SUB-COMPONENT PLANS	$_____
Deliverable 3	UNIFIED COMMUNICATION STRATEGIC PLAN	$_____
Total Firm Fixed Price:		$_____

Below are fully burdened hourly rates to perform the services under this work order.
*Please provide the labor classification that apparently matches the required role.

Resource Name	Labor Classification*	Role	Fully Burdened Rate	Number of Hours	Extended Firm Fixed Price
_____	_____	_____	$_____ /hr	_____	$_____

Pricing Requirements

❖ Examples

PRICE PROPOSAL INSTRUCTIONS

PRICE PROPOSAL IS AVAILABLE AS A SEPARATE DOWNLOADABLE FILE

1. Proposer shall download and complete the Price Proposal in its entirety and include it with submittals. The information must be entered and submitted in PDF format with signature and date, as well as an electronic copy of the Price Proposal in MS Excel format.

2. The proposer shall submit a fully burdened price proposal to perform all services as stated in the Statement of Work. All costs shall be fully burdened, and shall include but shall not be limited to, labor, materials, software subscriptions, hardware costs, etc. Pricing shall include ALL cost data and markup rates necessary to provide requested services.

3. The price proposal shall provide itemized cost component information for each element of service defined in the Statement of Work.

4. The intent is to have workstreams for each project with distinct requirements, timelines and separately priced deliverables. Please provide as much distinction as possible when pricing out product feature licenses, labor, hosting prices, and other costs for each workstream. If your proposed solution combines features from separate workstreams, please indicate this and separate the pricing and timelines to the extent possible. Please refrain from stating or assuming that any costs are included in existing District contracts and price them out separately.

For example, if you plan to leverage an existing licensing contract, please state the cost of the contract. Also, please note any dependencies between projects.

5. Proposers shall provide the best competitive prices on initial submission. Incomplete price proposals may deem the proposal non-responsive.

Pricing Category A

Licensing Costs

# of Licenses		License type		Year 1		Year 2		Year 3		Option Yea (Year 4)	Option Yea (Year 5)
ELA											
0-1,000											
1,001-10,000											
10,001-100,000											
100,001-200,000											
200,001-400,000											
400,000+											

Optional Costs

Description		Year 1		Year 2		Year 3		Option Y 1 (Year		Option Yea (Year 5)
Enhancements										
Support										

The Contractor shall provide the District specified discount off the published list price for any related Product Enhancements/Feature Upgrades/Additional Modules to the system. The discount shall be fixed for the duration of the contract.

Percentage Discount: _____

The District reserves the right to renew the annual subscription (subscription license) or the software maintenance (perpetual license) beyond year 5 subject to Board approval.

Percentage District Offered Off List Price beyond Year 5: _____

End of Presentation