Ed-Fi RFP Scoring Guide

Thank you for your willingness to participate in scoring the responses to SFUSD's Request for Proposals (RFP) *"TO IMPLEMENT AND SUPPORT AN ED-FI UNIFIED DATA SYSTEM INFRASTRUCTURE IN AMAZON WEB SERVICES RFP No. ED-FI 2018."*

This scoring guide was developed to help you understand SFUSD's priorities and norms for scoring responses, as well as help you thoughtfully and efficiently score the proposals based on the language provided to proposers in the RFP. You may also access the full RFP here: http://bit.ly/EdFiRFPSFUSD and the Q & A document provided to proposers here: http://bit.ly/EdFiRFPQA. Note that within the Q & A document, you will find a link to SFUSD's proposal to MSDF, which includes our proposed infrastructure and project plan. However, please see our scoring guide in the table below, as you may find sufficient resources there to score, without having to read the full RFP or proposal.

Initial Screening: Please note that the proposals you have received for scoring have undergone an initial screening. "Elements reviewed during the Initial Screening include without limitation: Proposal completeness, compliance with all requirements of this RFP including, without limitation, the Minimum Proposal Requirements of the RFP and verifiable references. Proposals [were] not scored during the Initial Screening process. Initial Screening is simply a pass/fail determination as to whether a Proposal meets the threshold requirements described in this RFP." However, if you feel that a minimum proposal requirement was not met upon your review, please indicate that on your review form, below.

NOTE: Do not score Hoonuit as their scores didn't meet the minimum requirements to qualify.

Panel: "The Selection Panel will be comprised of individuals who are knowledgeable on the subject matter, and may include staff from the Department of Technology and/or other SFUSD school sites or departments."

Selection Panel:
- Amanda Gonzalez, Unified Data Project Director
- Eddie Ngo, Director of Applications, SFUSD
- Kelly McBride, Student Systems Product Director, SFUSD

Evaluation Criteria: "Proposers must obtain a minimum score of forty-eight (48) points which is equivalent to sixty percent (60%) on their written Proposal (Step 1 of the evaluation process) to be considered for a panel interview (Step 2 of the evaluation process). A score greater than forty-eight (48) or sixty percent (60%) on the written proposal will not automatically guarantee an

invitation to the Step 2 of the evaluation process." [Note that the panel interview step was removed so as to give proposers more time to prepare responses.]

Evaluation Criteria	Points
Written Proposal	
The Proposer's strategy to implement the Ed-Fi infrastructure	15
Project management approach and services methodology	10
Experience with cloud-based implementations and support	5
Project workplan and project schedule	10
Total project budget	15
Security and confidentiality of data	5
Documentation of Proposer Qualifications Aspects of Written Proposal	
Examples of three (3) similar Reference Projects	15
Project team resumes and, as applicable, staffing descriptions	5
Total	**80**

Review Form: Please use one review form, below, per proposal. Please fill in your reviewer details for each review form that you complete.

Reviewer Name: Amanda Gonzalez
Title, Dept./Company Name: SFUSD
Signature and Date:
Proposer Name: Doubleline

A. Written Proposal		
Criteria (Possible Points)	**Score**	**Evidence**
1. Strategy to implement the Ed-Fi Infrastructure (15)* ❏ Does the proposer evidence a strategy that aligns with the SFUSD-MSDF grant proposal? ❏ Is there evidence to support the following implementation goals will be delivered:	14	- Yes, open-source solutions for ODS and data vault that aligns with SFUSD primary reasons for implementing and maintaing infra. - The DQ rule engine they have works on the Detroit Data Hub, but I'm pretty

❏ **Ed-Fi API** by 12/30/18 ❏ **Ed-Fi ODS** by 12/30/18 ❏ Ed-Fi **Data Vault**, or "superior" solution by 12/30/18 ❏ **Data Quality Rules Engine** by 12/30/18 ❏ **Supporting infrastructure**, (DevOps) to support vendor integrations, data model extensions, deployment and version upgrades, with staging, test, and production environments by 12/30/18 ❏ Does the proposer discuss the process of obtaining and loading foundational data? Do they discuss descriptors? ❏ Does the proposer discuss the approach for defining and deploying Ed-Fi extensions? ❏ Is the proposer's approach to the data vault (or superior alternative) automate the generation of the schema? (Completely automate the loading, eliminating manually developed ETL? Support point in time querying? Maintain longitudinal integrity?) ❏ Does the proposer discuss the methodology for defining and deploying business rules? For disseminating business rule exceptions to appropriate data stewards? ❏ Does the proposer understand vendor interoperability using the Ed-Fi ODS? *See RFP p. 12 for detailed requirements.		sure that Data Hub only has the ODS and not data vault, so we should clarify their experience in implementing components of the rules engine on top of a longitudinal data such as that housed in a DV - Great that it's open-source, They've promised a lot for DataMart ETL! Really cool, and also state "We also acknowledge some risk related to the data marts, as the number and size of the existing and to-be-created marts is undocumented. We made assumptions on these variables and documented them in our response." - -
2. Project management approach and services methodology (10)* ❏ Is there evidence to support that the proposer's approach and methodology would be a good fit with SFUSD's implementation team	9	- Proposed Kanban and provided a waterfall timeline for how the pieces would come together - They have a dedicated team of 5 including a PM

and its needs? ❏ Is there evidence to support that the proposer's approach and methodology understands SFUSD's equity goals and that there is mission/vision alignment? ❏ Is there a dedicated project manager? *See RFP pgs. 10-13, 17-18 for detailed requirements.		
3. Experience with cloud-based implementations and support (5)* ❏ Experience with AWS implementations ❏ Understanding of requirements for AWS implementation ❏ Discuss the approach for security and privacy? ❏ Discuss the approach for scalability? *See RFP p. 15 for detailed requirements	5	- Yes experience with AWS
4. Project work plan and project schedule (10)* ❏ Project Plan: Within 5 days after the project kickoff. ❏ User Acceptance Plan: Draft 8/15/18, final 9/15/18. ❏ Operational Test Infrastructure and Sandbox environment (includes loading of foundational data (schools, descriptors, etc.), 8/1/18. ❏ Fully operational Staging-Test-Production Infrastructure ready for a limited production, 10/1/18. ❏ System administration and DevOps training and knowledge transfer, Oct-Nov 2018. ❏ Rule authoring, data stewardship training, & knowledge transfer Oct-Nov 2018. ❏ Fully operational Staging-Test-Production Infrastructure ready for a full production, 12/1/18.	8	- Provided on page 19

❏ User acceptance testing and demonstration no later than 12/31/18. ❏ Training and knowledge transfer ❏ Maintenance and technical support, vendor integration support, and schema management support, provided continuously on an as-needed basis throughout the term of the contract (assumes 3 years). *See RFP p. 15 for scope and proposal p. 20 for milestone timetable.		
5. Total project budget (15)* ❏ Within SFUSD grant budget of $200k annually? ❏ "Proposals must include a detailed Total Project Budget, segmented into costs per calendar year, by deliverable, with details provided per month." ❏ "The Project Budget must correlate directly to the Proposer's Proposal for providing the deliverables and services in the scope of work." ❏ "Pricing for Optional Services should be provided separately and not included in the total amount." ❏ "Any costs of travel must be specified and broken out separately in the Total Project Budget." ❏ "Any software product licensing, subscription, managed services, or recurring fees must be separately broken out in the Total Project Budget." ❏ As a reminder, SFUSD is seeking a proposed budget for 2018, 2019, and 2020 as part of the RFP response, even though the 2018 scope is the only work that will be awarded at this time. ❏ Proposers should include in their proposals their pricing for optional	12	- Really over budget - Why will it cost almost $100K to upgrade to EdFi 3.0 next year? - Implementation is $20K but the management is $80K .. would love to hear why that is from other customers - Costs seem flexible based on the final scope we land on

Criteria (Possible Points)	Score	Evidence
services that include the following: ❏ Services to map, design, and validate vendor integrations ❏ Data mart integration services ❏ Data model extension analysis, mapping and modeling ❏ Business rule authoring and collaboration with SFUSD governance ❏ Data steward mentoring *See proposal p. 22 for full grant budget and RFP p. 17 & p. 19 for budget guidance.		
6. Security and confidentiality of data (5)* ❏ "Proposals must address how security and confidentiality of data shall be maintained in each component of the infrastructure and detail the Proposer's experience in maintaining the security and confidentiality of data in other similar projects that the Proposer has completed." *See RFP p. 18 for guiding language.	5	Amazon RDS will handle security within the network including data encryption at rest and in transit, network isolation, and resource/user-level permissions. At the network level, Double Line will utilize the current SFUSD VPN and firewall settings to define user access. At the transport level, Double Line will setup SSL and TLS for end-to-end data path encryption for ETL and API data transfers. Seems right, need to confirm with our techincal staff
Written Total Score	53	

Additional Scorer Notes:

B. Documentation of Qualifications		
Criteria (Possible Points)	**Score**	**Evidence**
1. Examples of three similar reference projects (5 points per project, total 15)* ❏ Project basics (e.g., project name, scope, dates work performed) ❏ Client organization name and	10	-They only provide one example which is the Data Hub in Detroit, which is HUGE... but I don't think they configured a vault - they don't have experience in CA

address, as well as the name, title and contact information of the client organization's project manager for the reference project, whom SFUSD will contact for reference checking purposes.
❏ Proposer staff members who worked on the project, including name and role.
❏ Detailed descriptions that evidence:
    ❏ Documented Ed-Fi knowledge and experience.
    ❏ Documented experience in collaborating in the development of complex software solutions.
    ❏ Documented experience in handling confidential data in a manner that maintains the data's security and confidentiality in compliance with applicable state and federal laws and regulations.
    ❏ Documented experience and capacity in providing updates, modifications, maintenance and support to cloud-based products and solutions.
*See RFP p. 22 for guidance.		

2. Project team resumes, and, as applicable, staffing descriptions (5)* ❏ Resumes and descriptions of the project team and staffing resources *See RFP p. 22 for guidance.	5	- provided
Documentation Total Score	15	
Additional Scorer Notes:		
Overall Total Score (written + documentation, must be >48 for consideration)**:**	68	

Reviewer Name: Amanda Gonzalez

Title, Dept./Company Name: SFUSD

Signature and Date:

Proposer Name: Certica Solutions

B. Written Proposal		
Criteria (Possible Points)	**Score**	**Evidence**

2. Strategy to implement the Ed-Fi Infrastructure (15)*
❏ Does the proposer evidence a strategy that aligns with the SFUSD-MSDF grant proposal?
❏ Is there evidence to support the following implementation goals will be delivered:
    ❏ **Ed-Fi API** by 12/30/18
    ❏ **Ed-Fi ODS** by 12/30/18
    ❏ Ed-Fi **Data Vault**, or "superior" solution by 12/30/18
    ❏ **Data Quality Rules Engine** by 12/30/18
    ❏ **Supporting infrastructure**, (DevOps) to support vendor integrations, data model extensions, deployment and version upgrades, with staging, test, and production environments by 12/30/18
❏ Does the proposer discuss the process of obtaining and loading foundational data? Do they discuss descriptors?
❏ Does the proposer discuss the
	10	Timeline:
		● Page 24 -- assumes start date of July 1, which is likely going to be pushed to Sept 1... should discuss timeline shifts.
		
		Experience with EdFi
		● Demonstrated experience in working with the standard
		● Rules engine is proven
		● A concern I have about their DV is that it is forward-looking only; also I don't understand what they mean when they say their DV is not a DW replacement
		
		Managed services approach
		● Based on my understanding of SFUSD goals, I don't think we want managed services
		● Doesn't seem like they've provided a non-managed services option

approach for defining and deploying Ed-Fi extensions? ❏ Is the proposer's approach to the data vault (or superior alternative) automate the generation of the schema? (Completely automate the loading, eliminating manually developed ETL? Support point in time querying? Maintain longitudinal integrity?) ❏ Does the proposer discuss the methodology for defining and deploying business rules? For disseminating business rule exceptions to appropriate data stewards? ❏ Does the proposer understand vendor interoperability using the Ed-Fi ODS? *See RFP p. 12 for detailed requirements.		
3. Project management approach and services methodology (10)* ❏ Is there evidence to support that the proposer's approach and methodology would be a good fit with SFUSD's implementation team and its needs? ❏ Is there evidence to support that the proposer's approach and methodology understands SFUSD's equity goals and that there is mission/vision alignment? ❏ Is there a dedicated project manager? *See RFP pgs. 10-13, 17-18 for detailed requirements.	6	PM: - They propose quarterly work goals, but by the time they get started they'll have to do this in a little under 1.5 quarters -- would like to have 1-2-week sprint cycles with them, informed by the quarter planning (they do appear to mention sprints later) - I would like to talk to them about flopping phases 5 & 6 and running thru the production with enrollment data so that we can learn from that as it could inform valuable lessons learned for attendance - Their promise to fork their code and re-merge in github sounds great if they can deliver on that. - Their intro reinforces the equity goals - Yes, dedicated PM

			- Concerns about how much of this is proprietary based on their Q&A response - Doesn't seem like it aligns with our goals to share back to the Alliance
4. Experience with cloud-based implementations and support (5)* ❏ Experience with AWS implementations ❏ Understanding of requirements for AWS implementation ❏ Discuss the approach for security and privacy? ❏ Discuss the approach for scalability? *See RFP p. 15 for detailed requirements	3		- They put the DV in the cloud for Yes Prep and BPS, but I don't think they specifically reference AWS - I'm less concerned about their explicit experience with AWS since that's been vetted by industry as fairly common approach; also our AWS team seems responsive and wants this to work (met Reina) - We wouldn't control the AWS hosting environment
5. Project work plan and project schedule (10)* ❏ Project Plan: Within 5 days after the project kickoff. ❏ User Acceptance Plan: Draft 8/15/18, final 9/15/18. ❏ Operational Test Infrastructure and Sandbox environment (includes loading of foundational data (schools, descriptors, etc.), 8/1/18. ❏ Fully operational Staging-Test-Production Infrastructure ready for a limited production, 10/1/18. ❏ System administration and DevOps training and knowledge transfer, Oct-Nov 2018. ❏ Rule authoring, data stewardship training, & knowledge transfer Oct-Nov 2018. ❏ Fully operational Staging-Test-Production Infrastructure ready for a full production, 12/1/18. ❏ User acceptance testing and	9		- Provided a project plan and activities at each phase. - There was a gant chart outlining most of this. - Data breach notification

demonstration no later than 12/31/18. ❏ Training and knowledge transfer ❏ Maintenance and technical support, vendor integration support, and schema management support, provided continuously on an as-needed basis throughout the term of the contract (assumes 3 years). *See RFP p. 15 for scope and proposal p. 20 for milestone timetable.		

6. Total project budget (15)*
    ❏ Within SFUSD grant budget of $200k annually?
    ❏ "Proposals must include a detailed Total Project Budget, segmented into costs per calendar year, by deliverable, with details provided per month."
    ❏ "The Project Budget must correlate directly to the Proposer's Proposal for providing the deliverables and services in the scope of work."
    ❏ "Pricing for Optional Services should be provided separately and not included in the total amount."
    ❏ "Any costs of travel must be specified and broken out separately in the Total Project Budget."
    ❏ "Any software product licensing, subscription, managed services, or recurring fees must be separately broken out in the Total Project Budget."
    ❏ As a reminder, SFUSD is seeking a proposed budget for 2018, 2019, and 2020 as part of the RFP response, even though the 2018 scope is the only work that will be awarded at this time.
    ❏ Proposers should include in their proposals their pricing for optional services that include the following:
	8	- It's over budget
		- Do we buy the licenses 1x or is it ongoing? And what's it contigent on?
		- Based on Q&A and in-house team review, on-going costs are cost-prohibitive
		- If we wanted to move away from Certica, it is unclear that we would own the infrastructure

❏ Services to map, design, and validate vendor integrations ❏ Data mart integration services ❏ Data model extension analysis, mapping and modeling ❏ Business rule authoring and collaboration with SFUSD governance ❏ Data steward mentoring *See proposal p. 22 for full grant budget and RFP p. 17 & p. 19 for budget guidance.		
7. Security and confidentiality of data (5)* ❏ "Proposals must address how security and confidentiality of data shall be maintained in each component of the infrastructure and detail the Proposer's experience in maintaining the security and confidentiality of data in other similar projects that the Proposer has completed." *See RFP p. 18 for guiding language.	4	Chief Security Architect; CISSP certification - License explicitly states it will comply with FEPRA Doesn't seem like we would have direct control as this would be in their cloud
Written Total Score	40	
Additional Scorer Notes:		

B. Documentation of Qualifications		
Criteria (Possible Points)	**Score**	**Evidence**
2. Examples of three similar reference projects (5 points per project, total 15)* ❏ Project basics (e.g., project name, scope, dates work performed) ❏ Client organization name and address, as well as the name, title and contact information of the client organization's project manager for the reference project, whom SFUSD will contact for reference checking purposes. ❏ Proposer staff members who worked on the project, including	9	- BPS, similarly sized but only has an ODS prototype and Certify Pilot - Yes-Preps' project seems like they were pushing data into Yes Prep's existing DW as opposed to setting something up; it does say elsewhere that they did configure an ODS - LAUSD leveraged Certify Enterprise Edition

name and role.
❑ Detailed descriptions that evidence:
    ❑ Documented Ed-Fi knowledge and experience.
    ❑ Documented experience in collaborating in the development of complex software solutions.
    ❑ Documented experience in handling confidential data in a manner that maintains the data's security and confidentiality in compliance with applicable state and federal laws and regulations.
    ❑ Documented experience and capacity in providing updates, modifications, maintenance and support to cloud-based products and solutions.
*See RFP p. 22 for guidance.		

3. Project team resumes, and, as applicable, staffing descriptions (5)* ❑ Resumes and descriptions of the project team and staffing resources *See RFP p. 22 for guidance.	5	Resumes; their architect knows both Python and C# .. what does our shop use?
Documentation Total Score	14	
Additional Scorer Notes:		
Overall Total Score (written + documentation, must be >48 for consideration)**:**	54	