

San Francisco Unified School District

**Department of Technology
Purchasing Department
Request for Proposal RFP No. ED-FI 2018**

**TO IMPLEMENT AND SUPPORT AN ED-FI UNIFIED DATA SYSTEM INFRASTRUCTURE
IN AMAZON WEB SERVICES**

**PRE-PROPOSAL CONFERENCE
May 9, 2018 10:00 am - 12:00 pm DoT Training Lab**

Questions and Answers re RFP No. ED-FI 2018

Below are the questions that SFUSD has received regarding RFP No. ED-FI 2018, as well as the District's response to these questions.

Q1: I see on page 30 that the document states questions have to be asked by May 4th but the Pre-Proposal conference is May 9th. Isn't it customary to have the QA date follow the pre-proposal conference by a few days so that there is sufficient information flow? There will be companies that can't attend the pre-proposal conference.

A1: What we are trying to accomplish is to have as much question as possible before the pre-proposal conference and provide the answers on May 9th. Additional and follow up questions during the pre-proposal conference and answered questions will be posted on May 11th.

Q2: Whether companies from Outside USA can apply for this? (like, from India or Canada)

A2: Foreign entities must meet all legal requirements for doing business under U.S. and California law prior to responding to this RFP or submitting a proposal.

Q3. Whether we need to come over there for meetings?

A3: Please see page 18 "Location of Work to Be Performed: Meetings and presentations will occur in San Francisco or remotely via conference call, Google Hangouts, Skype, or another video- or teleconferencing system, at SFUSD's discretion, depending on SFUSD's needs and/ or the cost of travel. Notwithstanding the foregoing, the presentations the Proposer makes of its Proposal under this RFP may be made in San Francisco or remotely via a video- or teleconferencing system at the Proposer's discretion. As provided in Minimum Proposal Requirements, SFUSD is not responsible for any Proposer costs in making a Proposal under the RFP. If an award is made, the

Proposer will make its relevant staff available. Any costs of travel must be specified and broken out separately in the Proposal's Project Budget (see Project Budget below)."

Q4: Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

A4: Please see A3.

Q5: Can we submit the proposals via email?

A5: Please see "Submission requirements" page 31: "RFP shall be done so in writing via two hard copies and two electronic copies on USB drive."

Q6: On page 16 of the RFP under section "2018 Deliverables and Milestones", #4 and #5 look like duplicates. They both say "Fully operational Staging-Test-Production Infrastructure ready for a limited production 1 October 2018." Is one of these just a duplicate or should one of these items be something else?

A6: Yes, that was a duplicate. Our apologies for the confusion. If you believe that there should be additional deliverables or milestones, please detail them in your response.

Q7: On page 29 under the section Objection to Award of Agreement, it says "notice of appeal must be received by the District on or before 2:00 PM on May 2, 2017...". Should it be "5:00 PM on June 6, 2018" instead, which is the end of protest period as specified in the timeline.

A7: Our apologies for the confusion on this point. The narrative language under the protest header (pg 27-28) should be disregarded and, yes, "notice of appeal must be received by the District on or before 2:00 PM on May 2, 2017..." should be corrected to reflect "on or before 5:00 PM on June 6, 2017..." as correctly reflected in the timetable in the RFP on page 31.

Q8: Can you provide the original proposal narrative and/or grant narrative for the original MSDF planning grant issued in fall 2017?

A8: A redacted grant proposal to MSDF, the end product of the planning grant, is provided here <http://bit.ly/MSDFSFUSDPUBLIC>. The only redactions relate to budget (including FTE staff allocations, still in process internally) and any sensitive pricing information from AWS.

Q9: Can you provide the report that was delivered from the planning grant?

A9: The proposal to MSDF, provided at the link above, was the only deliverable, there were no other reports or documents.

Q10: Which vendor performed the original work on the planning grant?

A10: Certica Solutions performed the original work through a contract with MSDF.

Q11: Can you specify the vendor(s) for your application integrations needed for each year? This includes the select assessments, transport, and nutrition systems listed in the roadmap.

A11: The known vendors (at this time) are specified in the three-year roadmap on page 11 of the RFP.

Q12: Given that the Ed-Fi Data Vault is a proprietary solution from a single vendor and is fully compatible with the Ed-Fi data standard, is SFUSD open to procuring the Ed-Fi Data Vault separately?

A12: The data vault is an open, published pattern for data warehousing, in the same way that fact-dimension structures are, and we have provided a link in the RFP to the model, methodology, and architecture on page 14. As such, the technique is not proprietary to any vendor and any vendor is free to provide solutions using that design technique. We do not intend to procure it separately. Additionally, as stated on page 14: "SFUSD will consider approaches other than the Data Vault for its longitudinal data store, but Proposer must clearly show its superiority over the Data Vault approach."

Q13: Has SFUSD already explored the temporal ODS released by the Ed-Fi Alliance under the Early Adopter Program?

A13: Yes.

Q14: On page 16, three system deliverables are defined. The first of these on August 1st includes operational foundation data. Who or what vendor will be sending the foundational data? Please outline in detail what is expected in these three system deliveries.

A14: We are currently working on data governance as related to some of the data domains, but believe that most of this foundational data will be sourced from our SIS (Edupoint Synergy). As stated on page 16: "The selected Proposer will collaborate to obtain, format and load the foundational data." Therefore, we expect that you will collaborate with SFUSD and its system/application vendors to accomplish those activities based on the scope provided within this RFP. Additional details on the requested vendor integration support can be found on page 17. If you're proposing additional services beyond what is detailed in the RFP, please detail those assumptions and your rationale in your response.

Q15: Who will be building ETL from the Data Vault to the Data Marts (SFUSD or Offeror)? Have the Data Marts been designed, and the associated data specifications defined?

A15: The offeror in collaboration with SFUSD. Some of the data marts are existing, some will need to be developed. This is a continuing process as related to our current data governance efforts internally. Please detail your assumptions as to what you can provide in your proposal.

Q16: There are 9 application integrations listed on page 11 for Year 1. Please provide for each:

- Are they Ed-Fi certified?
- What approach is expected for data interoperability?
- Is interoperability expected by 1 December 2018?

A16: Please see A11, above. Bi-directional interoperability using the Ed-Fi API is the expected approach by the end of calendar year 2018 for the use cases detailed in Year 1 of the roadmap on page 11 of the RFP. There are some application consolidations happening currently and planned, which will likely decrease the number of applications that need to be integrated.

Q17: The infrastructure table on page 11 has Version Upgrades listed in Year 2. Is a project plan that moves to Ed-Fi ODS 3.0 in early 2019 compliant with the RFP requirements?

A17: The timing of the upgrade to 3.0 will have to be determined in collaboration with SFUSD and its current vendors, but it is expected that this upgrade will occur in 2019. Please see page 13 for additional insight on timing and upgrades: “In that major system version upgrades typically happen between school years in the June-August timeframes, the selected vendor must upgrade to the most recent Ed-Fi data model version and the API-ODS code base version recommended by the Ed-Fi Alliance.”

Q18: On page 7-13, one of the long-term goals seems to be to develop 360° Student/Teacher dashboards for teachers, and administrators providing real time actionable information. Is creating these views in years 2 and 3 part of proposer’s scope of work?

A18: Development of dashboards is not part of the scope of work.

Q19: Under supporting infrastructure page 15, there is a mention about operational monitoring on AWS. Will monitoring be accomplished through AWS standard tools, like cloud watch or will there be a requirement to build custom monitoring tools?

A19: As stated on page 15, we require “Operational monitoring and logging” and “Appropriate monitoring and scaling in the cloud based upon workload”. The offeror should be prepared to work with SFUSD and AWS to provide the appropriate tools to

meet these needs for SFUSD. As there are only a limited number of K-12 districts that have deployed Ed-Fi in AWS, we cannot be more specific as to what will be needed at this time and the offeror should clearly state its assumptions in its response.

Q20: What would be the expected number of training sessions and type (Web vs. In-person) to be conducted for SFUSD personnel throughout the three-year engagement?

A20: Please provide your assumptions on the number of sessions and type(s) of training(s) that you are prepared to provide in your response.

Q21: On page 14 there are several queries regarding the Data Vault. The Ed-Fi Alliance does not have a data vault implementation in the Ed-Fi GitHub [sic].

A21: Please see A12.

Q22: Are you looking for an implementation for Multi-Year Data Warehouse (Ed-Fi compatible data model), or specifically a Data Vault Architecture?

A22: Please see A12.

Q23: Several bulleted “reasons” are given advocating the Data Vault approach. The RFP then says that approaches other than Data Vault must clearly show superiority over the Data Vault approach. Would demonstrating that some of the reasons listed are flawed and/or not exclusive to the Data Vault approach be an acceptable part of the justification for advocating an alternative?

A23: Please see A12. Offerors are welcome to evidence why their proposed approach would be best in supporting SFUSD in achieving its aims as set forth in the RFP in any way they choose to do so, respecting the process set forth in the RFP.

Q24: There is no discussion in the RFP about user access control to the system. Is there an existing identity management or single sign-on approach used in SFUSD to which this system should conform?

A24: The scope of the RFP is for backend work only. Outside of administrative logins, SSO should not be of concern.

Q25: Regarding the diagram on page 13. With the exception of Bulk Assessments Scores all the core application suites are shown providing data via the API. Some of these applications have data which are not core – requiring extensions to the API and ODS schema. Presumably many of the operational applications will require extensions. Does SFUSD have any estimate of the number of core schema extensions will be required by year?

A25: We anticipate a limited number of extensions, but do not have an estimate at this time. Please provide your assumptions as it relates to providing Ed-Fi schema extensions and the resources you anticipate being able to devote to those assumptions.

Q26: When we send in our proposal, can you tell us do you have better luck with FedEx/UPS/other?

A26: We do not have a preference. We recommend getting it in early.

Q27: At the bottom of page 11, the bullet: “Integrate and bring to production a fully-functional Ed-Fi infrastructure by the end of calendar 2018; with” appears to be incomplete, could you please clarify?

A27: Please disregard the “with” in the last bullet on page 11.

Q28: Any guidance about the funding or cost of the project?

A28: No.

Q29: There is “Supporting Equity” verbiage but there were no specific deliverables related to this. Is the District expecting deliverables relating to “Supporting Equity.”

A29: The RFP states in its “Background” section that “The 2018 plan is being supported by an acceleration grant from MSDF, as follows: Focus on the district’s priority of equity to enable new and improved processes enabled by data that is timely, unified, and of high quality. Order the work according to specific use cases that serve both the district’s equity focus but also provides significant district impact where increased application interoperability would improve data use for better operational, teaching and learning outcomes.” All of the deliverables within this RFP are in support of those equity goals.

Q30: Are all critical success factors in the grant or if not, are there SFUSD factors for success?

A30: The RFP contains all of our requirements.

Q31: Will there be an opportunity for face-to-face interviews or for a verbal presentation?

A31: Our ability to award this contract in this fiscal year is contingent upon board approval at the June 26th board meeting. We structured our timeline to give offerors as much time as possible to prepare responses. Our abbreviated selection timeline reflects those two priorities. As such, we have not budgeted time for verbal presentations or face-to-face interviews.

Q32: In the RFP page 13, bottom of page, last paragraph, can you expound on that?

A32: No.

Q33: How would you recommend vendors interact AWS on any AWS questions?
Pre-proposal interactions and post-award?

A33: Post-award, the SFUSD project director will manage the relationships among all vendors. We cannot dictate how AWS chooses to interact with any vendor prior to any contractual obligations, or the converse.

Q34: The RFP states that alternatives to the data vault must show superiority. Why do you require superiority? It would be a unique implementation in education. For that one requirement, if the proposer could show equality, would that be enough?

A34: Please see A12.

Q35: For some of our other implementations, there are data that are not supported in the Ed-Fi data model, how would you expect the additional domains of data to be brought in?

A35: We expect that there will be necessary extensions to the Ed-Fi data model as a part of this work.

Q36: For the dashboards do you plan to use the Ed-Fi dashboards or do you plan to build them custom and open-source?

A36: Dashboards will be built using Tableau. Again, please see A18 regarding dashboards.

Q37: Do you have a defined rules library to use in the data validation engine or would the vendor use their own library?

A37: SFUSD expects that the vendor will work with SFUSD to build a rules library that reflects our needs.

Q38: The direction of the longitudinal solution is under evaluation by the Ed-Fi Alliance and their community partners. If the Alliance decides to move forward with the T-ODS, will you still want to implement the data vault?

A38: Please see A12.

Q39: What work has been done by SFUSD to test and confirm the functionality of vendor APIs for each source system indicated in the diagram on page 13? Has SFUSD engaged vendors in API development work before? Does SFUSD have existing contracts or any other form of commitment from these vendors to conduct this work? If so, how are they structured to enable vendors to conduct the work? E.g. are there funds or hours allocated to pay vendors for mapping, development, testing, and release? If not, are there funds to support this work or should proposers include these costs in our pricing?

A39: Please see A14. Responses should make clear your assumptions regarding this work and your ability to support SFUSD.

Q40: Is SFUSD able to share definitions and structure of the existing data marts?

A40: We do not have any additional information to share, beyond what is included in the RFP and any resources provided here.

Q41: Is SFUSD able to share a roadmap of future data marts along with any available information and if the structures of them are different?

A41: The three year roadmap on page 11 references all of the known data mart integrations.

Q42: Can we get updated information via other means beside the website?

A42: Per pages 30-32 of the RFP: "Questions asked during the Pre-Proposal Proposer Conference will be answered during the conference, and a written question-and-answer document will provide all such questions and answers in writing afterwards, posted to the website on which this RFP is posted. Any question that cannot be answered during the conference will be addressed in the post-conference question-and-answer document. In no event shall any oral statement made by SFUSD staff in relation to this RFP be binding upon SFUSD. SFUSD shall only be bound by statements and information provided in writing in this RFP, via written addendum to this RFP, or via other written posting by SFUSD to the same Current RFPs, RFQs and RFI's webpage to which this RFP is posted. Proposers are responsible to check that website regularly for any updates and postings that may be provided. All communications regarding this RFP must be directed in writing to both: Rod Sarmiento, Purchasing, 135 Van Ness Ave., Room 123 San Francisco, CA 94102 Email: SarmientoR@sfusd.edu All communications must be in writing, have the subject line "RFP #ED-FI 2018" and reference the RFP title and the specific section(s) of the RFP being referred to. The Proposer will also include all contact information for the requestor and its company."

Q43: Page 15 second bullet. Need clarification on PDS vs. PDF.

A43: PDS is a typo. Should read PDF.

Q44: Page 14, 4th bullet down under "data quality rules engine". Need clarity on the missing sentence and words.

A44: The bullet referenced: "Easy to use authoring interface that supporting rule development and maintenance by a trained technical user or business analyst" should read: "Easy to use authoring interface that supports rule development and maintenance by a trained technical user or business analyst."