

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.

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 Systems Project Director, SFUSD
- 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: Kelly McBride		
Title, Dept./Company Name: Student Systems Product Director, SFUSD		
Signature and Date:		
Proposer Name: Hoonuit		
Overall Total Score (written + documentation, must be >48 for consideration):	41	
A. Written Proposal		
Criteria (Possible Points)	Score	Evidence
1. Strategy to implement the Ed-Fi Infrastructure (15)* <ul style="list-style-type: none"> <input type="checkbox"/> Does the proposer evidence a strategy that aligns with the SFUSD-MSDF grant proposal? <input type="checkbox"/> Is there evidence to support the following implementation goals will be delivered: <ul style="list-style-type: none"> <input type="checkbox"/> Ed-Fi API by 12/30/18 <input type="checkbox"/> Ed-Fi ODS by 12/30/18 	8	<ul style="list-style-type: none"> ● Main strategy seems to be in dashboards and reporting ● Most ETL looks like it is file based, not API based ● Unclear if there is a proven EdFi track record/successful EdFi implementation - looks like they have expertise in

<ul style="list-style-type: none"> <input type="checkbox"/> Ed-Fi Data Vault, or “superior” solution by 12/30/18 <input type="checkbox"/> Data Quality Rules Engine by 12/30/18 <input type="checkbox"/> Supporting infrastructure, (DevOps) to support vendor integrations, data model extensions, deployment and version upgrades, with staging, test, and production environments by 12/30/18 <input type="checkbox"/> Does the proposer discuss the process of obtaining and loading foundational data? Do they discuss descriptors? <input type="checkbox"/> Does the proposer discuss the approach for defining and deploying Ed-Fi extensions? <input type="checkbox"/> 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?) <input type="checkbox"/> Does the proposer discuss the methodology for defining and deploying business rules? For disseminating business rule exceptions to appropriate data stewards? <input type="checkbox"/> Does the proposer understand vendor interoperability using the Ed-Fi ODS? <p>*See RFP p. 12 for detailed requirements.</p>		<p>LCAP and LCFF reporting but not with the EdFi standard.</p> <ul style="list-style-type: none"> ● They do discuss custom development work that can be added on, concern that there would be a large amount of custom work ● Unclear update policy - when EdFi releases code updates ● Our team would need to build custom rules engine ● Have had experience with AWS
<p>2. Project management approach and services methodology (10)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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? <input type="checkbox"/> Is there evidence to support that 	<p>5</p>	<ul style="list-style-type: none"> ● Unclear ongoing support model, seems mostly ad hoc ● Plan presented is very heavily focused on dashboards rather than getting the infrastructure up and running

<p>the proposer’s approach and methodology understands SFUSD’s equity goals and that there is mission/vision alignment?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Is there a dedicated project manager? <p>*See RFP pgs. 10-13, 17-18 for detailed requirements.</p>		<ul style="list-style-type: none"> ● Have a somewhat comprehensive view of mission and goals ● There is a dedicated project manager
<p>3. Experience with cloud-based implementations and support (5)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Experience with AWS implementations <input type="checkbox"/> Understanding of requirements for AWS implementation <input type="checkbox"/> Discuss the approach for security and privacy? <input type="checkbox"/> Discuss the approach for scalability? <p>*See RFP p. 15 for detailed requirements</p>	3	<ul style="list-style-type: none"> ● Do have experience with AWS ● Do have an approach to security and privacy ● Scalability was not discussed
<p>4. Project work plan and project schedule (10)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project Plan: Within 5 days after the project kickoff. <input type="checkbox"/> User Acceptance Plan: Draft 8/15/18, final 9/15/18. <input type="checkbox"/> Operational Test Infrastructure and Sandbox environment (includes loading of foundational data (schools, descriptors, etc.), 8/1/18. <input type="checkbox"/> Fully operational Staging-Test-Production Infrastructure ready for a limited production, 10/1/18. <input type="checkbox"/> System administration and DevOps training and knowledge transfer, Oct-Nov 2018. <input type="checkbox"/> Rule authoring, data stewardship training, & knowledge transfer Oct-Nov 2018. <input type="checkbox"/> Fully operational Staging-Test-Production Infrastructure ready for a full production, 12/1/18. <input type="checkbox"/> User acceptance testing and demonstration no later than 	5	<ul style="list-style-type: none"> ● Unclear when UAT planning occurs ● Options do not meet the training deadline ● Internal training does meet the deadline ● UAT is within timeline

<p>12/31/18.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Training and knowledge transfer <input type="checkbox"/> 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). <p>*See RFP p. 15 for scope and proposal p. 20 for milestone timetable.</p>		
<p>5. Total project budget (15)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Within SFUSD grant budget of \$200k annually? <input type="checkbox"/> “Proposals must include a detailed Total Project Budget, segmented into costs per calendar year, by deliverable, with details provided per month.” <input type="checkbox"/> “The Project Budget must correlate directly to the Proposer’s Proposal for providing the deliverables and services in the scope of work.” <input type="checkbox"/> “Pricing for Optional Services should be provided separately and not included in the total amount.” <input type="checkbox"/> “Any costs of travel must be specified and broken out separately in the Total Project Budget.” <input type="checkbox"/> “Any software product licensing, subscription, managed services, or recurring fees must be separately broken out in the Total Project Budget.” <input type="checkbox"/> 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. <input type="checkbox"/> Proposers should include in their proposals their pricing for optional services that include the following: <ul style="list-style-type: none"> <input type="checkbox"/> Services to map, design, 	<p>4</p>	<ul style="list-style-type: none"> ● One time fees to meet budget, unclear what the ongoing cost is ● Do not see budget detailed enough to answer RFP questions ● Travel will be billed at cost

<p>and validate vendor integrations</p> <ul style="list-style-type: none"> <input type="checkbox"/> Data mart integration services <input type="checkbox"/> Data model extension analysis, mapping and modeling <input type="checkbox"/> Business rule authoring and collaboration with SFUSD governance <input type="checkbox"/> Data steward mentoring <p>*See proposal p. 22 for full grant budget and RFP p. 17 & p. 19 for budget guidance.</p>		
<p>6. Security and confidentiality of data (5)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> “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.” <p>*See RFP p. 18 for guiding language.</p>	5	<ul style="list-style-type: none"> ● Proposal does address security
Written Total Score	30	
Additional Scorer Notes:		
B. Documentation of Qualifications		
Criteria (Possible Points)	Score	Evidence
<p>1. Examples of three similar reference projects (5 points per project, total 15)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project basics (e.g., project name, scope, dates work performed) <input type="checkbox"/> 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. <input type="checkbox"/> Proposer staff members who worked on the project, including name and role. 	7	<ul style="list-style-type: none"> ● Have demonstrated success with projects, but they are not EdFi projects

<ul style="list-style-type: none"> <input type="checkbox"/> Detailed descriptions that evidence: <ul style="list-style-type: none"> <input type="checkbox"/> Documented Ed-Fi knowledge and experience. <input type="checkbox"/> Documented experience in collaborating in the development of complex software solutions. <input type="checkbox"/> 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. <input type="checkbox"/> Documented experience and capacity in providing updates, modifications, maintenance and support to cloud-based products and solutions. <p>*See RFP p. 22 for guidance.</p>		
<p>2. Project team resumes, and, as applicable, staffing descriptions (5)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Resumes and descriptions of the project team and staffing resources <p>*See RFP p. 22 for guidance.</p>	4	<ul style="list-style-type: none"> ● Provided resumes, lacks outside of Hoonuit experience
Documentation Total Score	11	
Additional Scorer Notes:		

Reviewer Name: Kelly McBride
Title, Dept./Company Name: Student Systems Product Director, SFUSD

Signature and Date:

Proposer Name: Doubleline

Overall Total Score (written + documentation, must be >48 for consideration):

68

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 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

15

- Strategy does align with SFUSD proposal that is not managed services and is focused on building SFUSD capacity.
- No proprietary data vault or infrastructure.
- Concerned about developing a new data vault technology on such a short timeline
- Have had experience with EdFi implementations
- Have a rules engine

<p>longitudinal integrity?)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Does the proposer discuss the methodology for defining and deploying business rules? For disseminating business rule exceptions to appropriate data stewards? <input type="checkbox"/> Does the proposer understand vendor interoperability using the Ed-Fi ODS? <p>*See RFP p. 12 for detailed requirements.</p>		
<p>3. Project management approach and services methodology (10)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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? <input type="checkbox"/> Is there evidence to support that the proposer’s approach and methodology understands SFUSD’s equity goals and that there is mission/vision alignment? <input type="checkbox"/> Is there a dedicated project manager? <p>*See RFP pgs. 10-13, 17-18 for detailed requirements.</p>	8	<ul style="list-style-type: none"> ● Described their software development timeline, so concerns about the sparse project timeline ● Approach is aligned with SFUSD goals for implementation ● There is a dedicated project manager ● Train the trainer approach - unsure of ongoing support model
<p>4. Experience with cloud-based implementations and support (5)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Experience with AWS implementations <input type="checkbox"/> Understanding of requirements for AWS implementation <input type="checkbox"/> Discuss the approach for security and privacy? <input type="checkbox"/> Discuss the approach for scalability? <p>*See RFP p. 15 for detailed requirements</p>	5	<ul style="list-style-type: none"> ● Have AWS experience ● Discussed security approach
<p>5. Project work plan and project schedule (10)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project Plan: Within 5 days after the project kickoff. <input type="checkbox"/> User Acceptance Plan: Draft 8/15/18, final 9/15/18. 	8	<ul style="list-style-type: none"> ● Plan does meet deadlines, however it does look like there are not many details on what needs to happen between those major milestones to achieve them

<ul style="list-style-type: none"> <input type="checkbox"/> Operational Test Infrastructure and Sandbox environment (includes loading of foundational data (schools, descriptors, etc.), 8/1/18. <input type="checkbox"/> Fully operational Staging-Test-Production Infrastructure ready for a limited production, 10/1/18. <input type="checkbox"/> System administration and DevOps training and knowledge transfer, Oct-Nov 2018. <input type="checkbox"/> Rule authoring, data stewardship training, & knowledge transfer Oct-Nov 2018. <input type="checkbox"/> Fully operational Staging-Test-Production Infrastructure ready for a full production, 12/1/18. <input type="checkbox"/> User acceptance testing and demonstration no later than 12/31/18. <input type="checkbox"/> Training and knowledge transfer <input type="checkbox"/> 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). <p>*See RFP p. 15 for scope and proposal p. 20 for milestone timetable.</p>		
<p>6. Total project budget (15)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Within SFUSD grant budget of \$200k annually? <input type="checkbox"/> “Proposals must include a detailed Total Project Budget, segmented into costs per calendar year, by deliverable, with details provided per month.” <input type="checkbox"/> “The Project Budget must correlate directly to the Proposer’s Proposal for providing the deliverables and services in the scope of work.” <input type="checkbox"/> “Pricing for Optional Services should be provided separately and 	<p>12</p>	<ul style="list-style-type: none"> ● Does address a 3 year budget, is not below the \$200k annual budget ● Appears that we can negotiate costs depending on scope changes we may want

<p>not included in the total amount.”</p> <ul style="list-style-type: none"> ❑ “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: <ul style="list-style-type: none"> ❑ 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 <p>*See proposal p. 22 for full grant budget and RFP p. 17 & p. 19 for budget guidance.</p>		
<p>7. Security and confidentiality of data (5)*</p> <ul style="list-style-type: none"> ❑ “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.” <p>*See RFP p. 18 for guiding language.</p>	5	<ul style="list-style-type: none"> ● Do discuss the security and confidentiality plan
Written Total Score	53	

Additional Scorer Notes:

B. Documentation of Qualifications

Criteria (Possible Points)	Score	Evidence
<p>2. Examples of three similar reference projects (5 points per project, total 15)*</p> <ul style="list-style-type: none"><input type="checkbox"/> Project basics (e.g., project name, scope, dates work performed)<input type="checkbox"/> 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.<input type="checkbox"/> Proposer staff members who worked on the project, including name and role.<input type="checkbox"/> Detailed descriptions that evidence:<ul style="list-style-type: none"><input type="checkbox"/> Documented Ed-Fi knowledge and experience.<input type="checkbox"/> Documented experience in collaborating in the development of complex software solutions.<input type="checkbox"/> 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.<input type="checkbox"/> Documented experience and capacity in providing updates, modifications, maintenance and support to cloud-based products and solutions. <p>*See RFP p. 22 for guidance.</p>	10	<ul style="list-style-type: none">● Provide examples of EdFi experience● Provided general high level description of the projects, did not provide staff details or details on changes/modifications
<p>3. Project team resumes, and, as applicable, staffing descriptions (5)*</p> <ul style="list-style-type: none"><input type="checkbox"/> Resumes and descriptions of the project team and staffing	5	<ul style="list-style-type: none">● Provided resumes of experienced staff

resources *See RFP p. 22 for guidance.		
Documentation Total Score	15	
Additional Scorer Notes:		

Reviewer Name: Kelly McBride		
Title, Dept./Company Name: Student Systems Product Director, SFUSD		
Signature and Date:		
Proposer Name: Certica Solutions		
Overall Total Score (written + documentation, must be >48 for consideration):	59	

C. Written Proposal

Criteria (Possible Points)	Score	Evidence
<p>3. Strategy to implement the Ed-Fi Infrastructure (15)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Does the proposer evidence a strategy that aligns with the SFUSD-MSDF grant proposal? <input type="checkbox"/> Is there evidence to support the following implementation goals will be delivered: <ul style="list-style-type: none"> <input type="checkbox"/> Ed-Fi API by 12/30/18 <input type="checkbox"/> Ed-Fi ODS by 12/30/18 <input type="checkbox"/> Ed-Fi Data Vault, or “superior” solution by 12/30/18 <input type="checkbox"/> Data Quality Rules Engine by 12/30/18 <input type="checkbox"/> Supporting infrastructure, (DevOps) to support vendor integrations, data model extensions, deployment and version upgrades, with staging, test, and production environments by 12/30/18 <input type="checkbox"/> Does the proposer discuss the process of obtaining and loading 	10	<ul style="list-style-type: none"> ● Proposer has extensive EdFi and MSDF experience ● Evidence supports they will be able to provide the necessary infrastructure ● Concern with confirming our non-cloud based SIS platform will be compatible ● Unclear if any of the ongoing implementations have been completed ● There is an approach to descriptors that need to be customized ● Managed services approach with on-going licensing fees

<p>foundational data? Do they discuss descriptors?</p> <ul style="list-style-type: none"> <input type="checkbox"/> Does the proposer discuss the approach for defining and deploying Ed-Fi extensions? <input type="checkbox"/> 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?) <input type="checkbox"/> Does the proposer discuss the methodology for defining and deploying business rules? For disseminating business rule exceptions to appropriate data stewards? <input type="checkbox"/> Does the proposer understand vendor interoperability using the Ed-Fi ODS? <p>*See RFP p. 12 for detailed requirements.</p>		
<p>4. Project management approach and services methodology (10)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> 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? <input type="checkbox"/> Is there evidence to support that the proposer’s approach and methodology understands SFUSD’s equity goals and that there is mission/vision alignment? <input type="checkbox"/> Is there a dedicated project manager? <p>*See RFP pgs. 10-13, 17-18 for detailed requirements.</p>	8	<ul style="list-style-type: none"> ● Detailed an implementation methodology and called out the requirement for SFUSD to have dedicated resources ● There is a dedicated project manager ● Managed services approach isn’t consistent with SFUSD desire to maintain in-house
<p>5. Experience with cloud-based implementations and support (5)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Experience with AWS implementations <input type="checkbox"/> Understanding of requirements for AWS implementation 	3	<ul style="list-style-type: none"> ● Do have experience implementing on AWS ● Discuss security and privacy ● Could provide more details around scalability

<ul style="list-style-type: none"> <input type="checkbox"/> Discuss the approach for security and privacy? <input type="checkbox"/> Discuss the approach for scalability? <p>*See RFP p. 15 for detailed requirements</p>		<ul style="list-style-type: none"> ● SFUSD wouldn't have direct control over the AWS environment as it is their solution in their AWS cloud.
<p>6. Project work plan and project schedule (10)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project Plan: Within 5 days after the project kickoff. <input type="checkbox"/> User Acceptance Plan: Draft 8/15/18, final 9/15/18. <input type="checkbox"/> Operational Test Infrastructure and Sandbox environment (includes loading of foundational data (schools, descriptors, etc.), 8/1/18. <input type="checkbox"/> Fully operational Staging-Test-Production Infrastructure ready for a limited production, 10/1/18. <input type="checkbox"/> System administration and DevOps training and knowledge transfer, Oct-Nov 2018. <input type="checkbox"/> Rule authoring, data stewardship training, & knowledge transfer Oct-Nov 2018. <input type="checkbox"/> Fully operational Staging-Test-Production Infrastructure ready for a full production, 12/1/18. <input type="checkbox"/> User acceptance testing and demonstration no later than 12/31/18. <input type="checkbox"/> Training and knowledge transfer <input type="checkbox"/> 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). <p>*See RFP p. 15 for scope and proposal p. 20 for milestone timetable.</p>	8	<ul style="list-style-type: none"> ● Provided a detailed project plan ● Used dates provided - should this include confirmation of third party vendor timelines (ie SIS dependencies)
<p>7. Total project budget (15)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Within SFUSD grant budget of 	10	<ul style="list-style-type: none"> ● Provide a 3 year budget plan

<p>\$200k annually?</p> <ul style="list-style-type: none"> ❑ “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: <ul style="list-style-type: none"> ❑ 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 <p>*See proposal p. 22 for full grant budget and RFP p. 17 & p. 19 for budget guidance.</p>		<ul style="list-style-type: none"> ● Is not with the \$200k annual budget ● Many onsite resources are at additional cost ● Doesn’t seem like costs would be negotiable since this is for managed services w/ set licensing fees
<p>8. Security and confidentiality of data (5)*</p>	<p>5</p>	<p>Proposal does address security</p>

<p><input type="checkbox"/> “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.”</p> <p>*See RFP p. 18 for guiding language.</p>		<p>details</p>
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Written Total Score	44	
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Additional Scorer Notes:

B. Documentation of Qualifications

Criteria (Possible Points)	Score	Evidence
<p>3. Examples of three similar reference projects (5 points per project, total 15)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Project basics (e.g., project name, scope, dates work performed) <input type="checkbox"/> 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. <input type="checkbox"/> Proposer staff members who worked on the project, including name and role. <input type="checkbox"/> Detailed descriptions that evidence: <ul style="list-style-type: none"> <input type="checkbox"/> Documented Ed-Fi knowledge and experience. <input type="checkbox"/> Documented experience in collaborating in the development of complex software solutions. <input type="checkbox"/> 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 	10	<ul style="list-style-type: none"> ● Provided 3 references, however only 2 are completed and one is a pilot ● They are EdFi implementations so there is experience implementing and building

<p>regulations.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Documented experience and capacity in providing updates, modifications, maintenance and support to cloud-based products and solutions. <p>*See RFP p. 22 for guidance.</p>		
<p>4. Project team resumes, and, as applicable, staffing descriptions (5)*</p> <ul style="list-style-type: none"> <input type="checkbox"/> Resumes and descriptions of the project team and staffing resources <p>*See RFP p. 22 for guidance.</p>	5	<ul style="list-style-type: none"> ● Provided resumes of experience staff
Documentation Total Score	15	
Additional Scorer Notes:		