
REQUEST FOR PROPOSALS

TE1101 – Community Education Software Solution

PARK HILL SCHOOL DISTRICT

Department of Technology

7703 NW BARRY ROAD KANSAS CITY, MO 64153

Phone: 816-359-6104 Email: RFP_Tech@parkhill.k12.mo.us

ADVERTISEMENT/INVITATION TO BID NUMBER: TE1101

The Park Hill School District, Department of Technology, will accept separate sealed proposals from qualified persons or firms interested in providing the following:

COMMUNITY EDUCATION (CE) SOFTWARE SOLUTION

IN ACCORDANCE WITH THE ATTACHED SPECIFICATIONS

PROPOSALS MUST BE RECEIVED AND WILL BE OPENED AT 11:00 AM LOCAL TIME ON FEBRUARY 28th, 2020.

PLEASE MARK YOUR ENVELOPE "SEALED BID TE1101" AND RETURN 2 COPIES TO:

Park Hill School District, Department of Technology

7703 NW Barry Road

Kansas City, MO 64153

Phone: 816-359-6104

It is the responsibility of interested firms to check the District's website at:

http://www.parkhill.k12.mo.us/district_information/requests_for_proposal_and_bids, for any addendums prior to the opening date and time of this Bid. All addendums must be signed and included with submitted Bid.

BID NUMBER:	TE1101
QUESTION DEADLINE:	February 13 th , 2020 @ 4:00 PM, CST
BID RESPONSE DUE:	February 28 th , 2020 @ 11:00 AM, CST

The undersigned, on behalf of the Bidder, certifies that: (1) this offer is made without previous understanding, agreement or connection with any person, firm, or corporation making a bid on the same project; (2) is in all respects fair and without collusion or fraud; (3) the person whose signature appears below is legally empowered to bind the firm in whose name the bid is entered; (4) they have read the complete Request for Bid and understand all provisions; (5) if accepted by Park Hill School District, this Bid is guaranteed as written and amended and will be implemented as stated; and (6) mistakes in writing of the submitted Bid will be bidder responsibility.

Name of Bidder: _____

Primary Contact: _____

Email Address: _____

Address: _____ **City:** _____ **State:** _____ **Zip:** _____

Phone Number: _____ **Fax:** _____

Taxpayer ID Number: _____

If Corporation – Date & State of Incorporation _____

I. BACKGROUND

The Park Hill School District has approximately 12,050 students (Pre-K – 12), and encompasses most of southern Platte County, Missouri, in the Northland region of the Kansas City Metropolitan Area. There are eight cities and towns that are partly or entirely within the district boundaries, including Parkville, Riverside, Weatherby Lake, Platte Woods, Lake Waukomis, Houston Lake, Northmoor and Kansas City, Missouri. Park Hill has two high schools, four middle schools, eleven elementary schools, a day school, an early childhood education program and a community education program.

Community Education works to extend learning opportunities to all members of the community that promote lifelong learning through professional and personal enrichment. Classes are offered at various campuses immediately after school, in the evenings and at other outside locations. Community Education classes are promoted to the public via our catalogs (winter, summer and fall), website and social media. Currently, there are 746 students and 75 instructors. In 2019, 669 classes were offered, and 2,971 registrations were taken.

II. TIMELINE

The timeline listed below is the District's estimation of the time required to complete the RFP process, make an award, and initiate services. All efforts shall be made to abide by this schedule, but it may change due to different circumstances.

Post RFP Notification: January 31st, 2020
Question Cutoff date: February 13th, 2020 @ 4:00 PM, CST
Proposal Due Date: February 28th, 2020 @ 11:00 AM, CST
Meet to review: March 4th, 2020
Presentations: Week of March 23rd, 2020
Notice of Award / Purchase Order: April 7th, 2020

III. SELECTION PROCESS

The proposals will be evaluated by a Selection Committee comprised of selected District personnel. The overall process may consist of two steps: the first being a review and evaluation of all responsive proposals and the second being the interview phase for the short list of respondents selected for interview.

Step One: Evaluation of Responsive Proposal Requirements

Members of the Selection Committee will review and rate each responsive proposal requirement based on the following criteria:

- 5 – Fully Meets
- 4 – Meets, with minor gaps (no compromise required)
- 3 – Meets, with moderate gaps (some compromise required)
- 2 – Partially Meets (significant gaps, compromise required)
- 1 – Does not meet

Step Two: Short List Interviews

The written evaluation will produce a list of the top rated proposals that may be selected for interviews (short list). Oral interviews may be conducted in order to make a final decision. The Project Manager checks reference once a short list is determined. Reference check information is considered part of the interview process and incorporated into the firm's Experience & References criteria. Upon selection of the top rated firm after interviews, the District will negotiate the specific terms of the agreement including cost.

IV. BID CONDITIONS

In submitting a response to this Request for Proposal, vendors hereby understand the following:

- A. Park Hill School District reserves the right to reject any and/or all bids and responses to these and/or related documents, to accept any item(s) in the bids, to waive any irregularity in the bids, and further if determined to be non-responsive in any form, or if determined to be in the best interest of Park Hill School District.
- B. Park Hill School District interprets the term "Lowest Responsible and Best Bidder" as requiring Park Hill School District to:
(a) choose between the kinds of materials, goods, wares, or services subject to the bid, and (b) determine which bid is most suitable for its intended use or purpose. Park Hill School District can consider, among other factors, such things as references, past

performance, the availability of service(s), part(s) material(s) and/or supply(s), warranty, maintenance, freight costs, performance of product and labor cost of items upon which bids are received. Bid responses will be rejected if all bid specifications are not met.

- C. That Bidder, if an individual, is of lawful age and competent to enter into and perform the Work contemplated and, if a corporation, is duly incorporated and authorized to do business in this state.
- D. That this Bid is made without any understanding or agreement with any other person, firm or corporation making a Bid for the same purpose. That this Bid is made without any understanding or agreement with any other person, firm or corporation that such person, firm or corporation refrain from bidding and this Bid is in all respects fair and without collusion or fraud.
- E. That no member of the Board of Education of this District, nor any officer, employee or person whose salary is paid by said District, in whole or in part, is directly or indirectly interested in this Bid or any labor or material to be supplied under any Contract or any portion of the profits.
- F. That the prices stated herein are net, exclusive of all federal, state and municipal sales and excise taxes.
- G. Alternate bids (two or more bids submitted) will be considered for an award. Park Hill School District reserves the right to make the final determination of actual equivalency or suitability of such bids with respect to requirements outlined herein. The bids submitted, and any further information acquired through interviews, will become and is to be considered a part of the final completed contract. If there is any variance or conflict, the bid specifications will control.
- H. All questions regarding this bid request shall be submitted electronically, by date and time specified, to RFP_Tech@parkhill.k12.mo.us. The email must contain this bid number, name, date and numbered questions. Park Hill School District will not answer questions transmitted through facsimile or methods other than set forth in this paragraph. All questions will be answered in an addendum, 5 working days after question due date. Park Hill School District is not responsible for questions not received on or before the due date, including emails lost due to spam filters or technical issues.
- I. Bids submitted may not be withdrawn for a period of 60 days immediately following the opening of this Request for Bid.
- J. All requested information must be supplied. If bidders cannot respond to any part of this request, bidders should state the reason they cannot respond and note an exception. Bidders may provide supplemental information to assist Park Hill School District in analyzing its bid.
- K. If the bidder refuses or fails to make deliveries of the materials within the times specified on the face of the Request for Bid or purchase order, Park Hill School District may, by written notice, terminate the contract or purchase order.
- L. The bidder will certify and warrant that goods, personal property, chattels, and equipment sold and delivered are free and clear of any and all liens, or claims of liens.
- M. The successful bidder will hold and save Park Hill School District, and its officers, agents, servants/employees harmless from liability of any patented, or unpatented invention, process, article, or appliance manufactured, or used in the performance of the contract, including its use by Park Hill School District. Vendors working on Park Hill School District property or on behalf of Park Hill School District will be required to carry minimum insurance listed in bid document.
- N. All items furnished, if applicable, must be the best of their respective kinds, and will be free from defects in material and workmanship. Items will be subject to Park Hill School District inspection and approval at any time within 30 days after delivery. If a substitution is made, it will be the decision of a Park Hill School District representative to determine if it is of equal quality. Items furnished must be manufactured in compliance with all existing legal or governmental directives.
- O. Contracts entered into based on submitted bids are revocable if contrary to law.
- P. All project participants, consultants, engineers, contractors and subcontractors, must comply with all applicable Federal, State and Local laws pertaining to contracts entered into by governmental agencies. All participants must comply with the Americans with Disabilities Accessibility Guidelines (ADAAG).
- Q. The bidder responding to this bid solicitation proposes to furnish all materials, labor, supplies, equipment and incidentals necessary to provide the equipment/materials/services described herein in accordance with the Notification of Solicitation (if applicable), Request for Information (if applicable), Request for Bid, Addenda, Contract, Bonds, Insurance, Plans, Specifications, any Instructions, Mandatory Requirements and Conditions.

- R. Unless specified elsewhere in the document, all prices quoted must be F.O.B. specified destination and will include all delivery, handling, and any other charges related to delivery including surcharges.
- S. The bidder hereby certifies that he or she has carefully examined all of the documents for the project, has carefully and thoroughly reviewed this Request for Bid, has inspected the location of the project (if applicable), and understands the nature and scope of the work to be done; and that this bid is based upon the terms, specifications, requirements, and conditions of the Request for Bid documents. The bidder further agrees that the performance time specified is a reasonable time, having carefully considered the nature and scope of the project as aforesaid.
- T. It will be understood that any bid and any and/or all referencing information submitted in response to this Request for Bid will become the property of Park Hill School District, and will not be returned. As an educational entity, Park Hill School District is subject to making records available for disclosure after Board of Education approval of the recommendation.
- U. Park Hill School District will not be responsible for any expenses incurred by any vendor in the development of a response to this Request for Bid including any onsite (or otherwise) interviews and/or presentations, and/or supplemental information provided, submitted, or given to Park Hill School District and/or its representatives. Further, Park Hill School District will reserve the right to cancel the work described herein prior to issuance and acceptance of any contractual agreement/purchase order by the recommended vendor even if the Board of Education has formally accepted a recommendation.
- V. By submission of a response, the bidder agrees that at the time of submittal, he or she: (1) has no interest (including financial benefit, commission, finder's fee, or any other remuneration) and will not acquire any interest, either direct or indirect, that would conflict in any manner or degree with the performance of bidder's services, or (2) benefit from an award resulting in a "Conflict of Interest". A "Conflict of Interest" will include holding or retaining membership, or employment, on a board, elected office, department, or committee sanctioned by and/or governed by the Park Hill School District Board of Education. Bidders will identify any interests, and the individuals involved, on separate paper with the response and will understand that Park Hill School District may reject their bid/quotation. The bidder certifies that this bid is submitted without collusion, fraud or misrepresentation as to other bidders, so that all bids for the project will result from free, open and competitive bidding among all vendors.
- W. Park Hill School District will issue a purchase order/contract for the acquisition of products/services specified as a result of an award made in reference to this document. Contract documents will be subject to any regulations governed by the laws of the State of Missouri and any local resolutions specifically applicable to the purchase.
- X. Any dispute arising out of the contract documents or their interpretation will be litigated only within the courts of the State of Missouri. No prepayment of any kind will be made prior to shipment. Payment will be made upon verification of delivery, compliance with specifications, assurance that the product/service performs as specified and warranted, and receipt of correct invoicing.
- Y. Park Hill School District requests a just in time order process to alleviate storage issues and to ensure factory warranty stays engaged until products are installed.
- Z. If a current update to a product is available, please provide the current solution and note the change. AA. All associated costs required to complete project as specified should be included in your final bid.

V. DATA SECURITY & PRIVACY PROVISIONS

In submitting a response to this Request for Proposal, vendors hereby understand that a contract may be established which includes the following Security and Data Stewardship Provisions.

- 1. Security and Data Stewardship Provisions.** Vendor shall maintain at all times reasonable administrative, technical, and physical safeguards to protect the security, confidentiality, and integrity of the personally identifiable student, staff, parent or guardian data in its custody. Such safeguards shall include, at a minimum, the following:
 - a. Encryption technologies to protect data while in motion or at rest.
 - b. Guidelines for authorizing access to student information, including but not limited to the use of strict user login credentials and passwords.

- c. Adhere to privacy compliance standards, including but not limited to the latest recommendations of the International Organization for Standardization (ISO) and Payment Card Industry Data Security Standards (PCI DSS).
- d. Regular training of employees for complying with this agreement, including but not limited to FERPA, COPPA, and other applicable privacy laws.
- e. Regular updating and patching of network software, servers, and endpoint equipment.
- f. Regular penetration testing, vulnerability management, and intrusion prevention.
- g. Maintains all network equipment and devices in a secure facility where access is actively monitored and managed by secure ID cards and or entry logs.
- h. Performs regular backups and maintains redundant disaster recovery systems at a different physical site.
- i. Monitoring and logging of all network activity.
- j. Perform background checks on all personnel having access to District information.
- k. Has a process for defined process for authenticating callers, resetting access controls, establishing and deleting accounts.
- l. All District data and information collected and/or accessed under this agreement will be maintained and processed in compliance with relevant federal and state laws, regulations, and policies.
- m. All data, including at rest, in motion, backups and data residing in fail-over sites, shall reside within the physical boundaries of the United States.
- n. District data shall not be comingled with data from other customers without proper technical or physical separation.
- o. Vendor shall perform, at least annually, a comprehensive security audit of its network and systems, with such audit being performed by a reputable organization known to provide such services, and provide the results of each such audit to the District upon completion, but in no event later than thirty (30) days of the completion of each such audit.

2. Breach response. In the event of a security breach or unauthorized disclosure of personally identifiable information, the Vendor shall:

- a. Pay all costs and liabilities incurred by the District related to the security breach or unauthorized disclosure including, but not limited to, the costs of responding to inquires about the security breach or unauthorized disclosure, of notifying subjects about the breach, of mitigating the effects of the breach for the subjects, and of investigating the cause or consequences of the security breach or unauthorized disclosure, and correcting or remedying each such cause.
- b. Shall notify the District within a commercially reasonable time, but in no event later than thirty (30) days after discovering a breach or unauthorized disclosure. Vendor shall cooperate with District as reasonably requested in preparing and sending notifications to subjects of the breach.

3. Collection Provisions. Prior to Vendor collecting and/or gaining access to any education records under this agreement, Vendor shall provide District with its then-existing breach-remediation plan, and such plan shall be approved by the District prior to collection and/or access to any education records. A complete list of all data elements to be provided by District and/or collected by Vendor under this Agreement, including metadata.

4. Data Use, Retention, Disclosure, and Destruction Provisions. Vendor shall destroy all personally identifiable information, including metadata and all backups, in its custody upon request and/or at the termination of this agreement, and provide certification to District of same; provided, however, that prior to doing so, the Vendor shall be given the opportunity to receive any such information in a format decided by District upon its reasonable request. Any information collected by the Vendor during the term of this agreement shall not be used by or disclosed to any third party for the purposes of any commercial use, including but not limited to, advertising, marketing products or services, compilation of lists (whether data is aggregated or not) for sale or rental, analyzing or assessing data collected or accessed, development of future products or services, or creation of

individual, household, or group profiles. Vendor acknowledges and agrees that at all times during the term of this agreement, the District maintains ownership and direct control of all data collected or accessed under this agreement, including metadata, the Vendor may be collecting or accessing, and that Vendor does not own, nor does it acquire any right or license to the data other than as necessary to perform its obligations under this agreement. All information collected by Vendor under this Agreement shall be maintained separately from and not co-mingled with any data of any other person. Vendor shall provide to District a breakdown of all types of student information it collects, how it uses such information, and any disclosures and to whom of such information at least annually to District. Not limiting any of the foregoing, the Vendor shall not use any information it collects under this agreement for any use except as necessary to fulfill its obligations under this agreement or otherwise authorized by the District.

5. Data Access Provisions. Vendor shall facilitate the inspection, review, access, and amendment of student information in its custody by parents and/or eligible students. Requests for access, inspection, and review of student information shall be provided through the District, unless otherwise agreed to, to the requesting parent and/or eligible student in accordance and within the timeframes established under FERPA, as amended. Only authorized persons of Vendor shall have access to information collected by Vendor under this agreement, and then only when necessary to provide the services hereunder.

6. Modification, Assignment, Duration, and Termination Provisions.

- a. Modification. This agreement may not be altered, amended, or modified in any way except by a writing signed by the parties hereto.
- b. Assignment. Vendor shall not subcontract, delegate, assign, or otherwise transfer any of its obligations or rights under this agreement unless such third-party agrees to be bound by terms no less restrictive than those contained under this agreement, and prior approval is provided by District to Vendor.
- c. Termination for Insolvency. In the event Vendor is acquired or becomes insolvent, is adjudged bankrupt, makes an assignment for the benefit of its creditors, has its business placed in the hands of a receiver or trustee, or otherwise defaults on any of its financial obligations, Vendor shall provide immediate notice of same to District, and District may, upon written notice, immediately terminate and, in addition to any other right or remedy available to District, demand the return of all District data and information, and receive any assistance, as reasonably requested by District, to help in the transfer and setup of alternative services at no additional cost to District [or in the alternative and if applicable, can have an escrow setup: Vendor agrees to place all source code associated with Vendor Software (“Source Code”) in a third-party escrow arrangement with a designated escrow agent who shall be named and identified by Vendor and agreed to by District, and who shall be directed to release the deposited Source Code in accordance with a standard escrow agreement acceptable to District. In the event that the Source Code is released to District pursuant to the terms hereof, District shall be entitled to, and Vendor hereby grants to District, a perpetual, royalty free, use and access license to the Source Code, and furthermore, upon said release, District shall have the right to modify the Source Code in its sole and absolute discretion, and all such modifications and derivative software products will solely belong to District.]
- d. Termination for Breach. District may terminate this agreement at any time upon thirty (30) days advance written notice if Vendor violates or breaches any provision of this agreement, including but not limited to any provision of applicable law.

7. Insurance, Indemnification, Reps and Warranty Provisions.

- a. Insurance. During the term of this agreement and for a period of at least one (1) year thereafter, Vendor shall maintain the following types and minimum amounts of insurance coverage: (a) commercial general liability insurance (including contractual liability, bodily injury, property damage, and personal injury) with a combined single limit of not less than \$2,000,000 (per occurrence) and \$5,000,000 (aggregate); (b) professional liability insurance covering the errors and omissions of its employees providing professional or technical services with a coverage limit of not less than \$2,000,000 per person/occurrence; (c) data security/breach insurance covering liability for unauthorized access to, breach of, or use of information collected or accessed by Vendor under this agreement with a limit of not less than \$2,000,000 per claim and \$5,000,000 in the aggregate; and (d) workers’ compensation insurance complying with the coverage limits and in all other respects with applicable state workers’ compensation laws covering its employees and/or agents for work related injuries suffered by such employees and/or agents.

Vendor shall maintain all of the foregoing policies of insurance with reputable carriers and shall, on an annual basis, furnish District with certificates of insurance evidencing their terms of coverage. All such insurance policies shall be written as primary coverage and not contributing with or in excess of any coverage that District may carry. Vendor shall cause District to be added as an additional insured, as its interests may appear, on all such insurance policies.

b. Indemnification. Vendor shall indemnify and hold harmless District from and against any and all losses, expenses, damages, liabilities, and obligations, including, without limitation, reasonable court costs and attorneys' fees (collectively, "Losses") suffered or incurred by District to third parties if and only to the extent that (i) such Losses are directly caused by the Vendor's negligence or intentional misconduct, or by the Vendor's breach of its representations, warranties, or covenants in this agreement, or (ii) such Losses arise out of injury or death to persons, or infringement upon or violation of any patent, copyright, trade secret, or similar proprietary right of any third party, or any theft or misappropriation of personal confidential data with respect to information Vendor collects or accesses from District under this agreement.

i. Data Breach Indemnity. Notwithstanding any provisions of this agreement to the contrary, Vendor shall be responsible for all costs and expenses related to any such notifications and other associated costs (e.g. costs of credit monitoring services offered to individuals whose information was affected, legal fees, call center services, forensics services, and similar remediation costs) as a result of any data breach or unauthorized disclosure by Vendor. The remedies set forth herein shall be in addition to any other remedies available to District at law or in equity.

c. Representations and Warranties. Vendor agrees, represents, and warrants that at all times during this agreement, it agrees that it will:

i. at all times comply with applicable federal, state, and local laws, including but not limited to FERPA, COPPA, and PPRPA;

ii. will abide by all District rules, policies and procedures;

iii. not use and will limit access to information collected by Vendor under this agreement only to those authorized persons of Vendor as necessary to provide the services hereunder;

iv. ensure that the services will be free of substantial defect and be performed in a professional and workmanlike manner, and substantially in accordance with the descriptions for such services;

v. ensure the services to be provided hereunder do not infringe any third-party intellectual property rights; the services are free from viruses, back doors, time bombs, drop dead devices, Trojan horses, worms, and other destructive or malicious code and routines designed;

vi. use reasonable efforts to maintain, secure, and protect the information and data collected and accessed by it;

vii. has the requisite corporate or limited liability company right (as applicable), power and authority to enter into, and perform its obligations under this agreement;

viii. that entering into this agreement and performing as contemplated hereby will not breach, conflict with, or constitute a default under any other agreement, arrangement, or instrument;

ix. have the full and exclusive right necessary to grant all licenses, access, and other rights granted herein, and to fulfill its obligations under this agreement.

8. Scope and Other Terms. Vendor shall provide advance written notice to District of any changes to Vendor's policies or practices that affect its obligations under this agreement, and such changes shall be approved by District before any changes go into effect. All District policies and terms of service are hereby incorporated into this agreement. No unapproved Vendor policy or terms of service shall govern the use of Vendor's service, whether or not agreed to by a student, teacher, or other unauthorized District personnel, nor shall any unauthorized District personnel be able to bind or otherwise modify this agreement. Any conflicting terms between this agreement, District policies, or other Vendor policies (if approved by District), including any terms of service or other policy that must be approved by a user to access the Vendor service, shall take priority as follows: District policies, this agreement, and approved Vendor policies.

9. Service Level and Support. Vendor shall abide by its service level commitments and maintain adequate support personnel to effectively provide assistance to District and meet its commitments under this agreement.

10. Governing Law. This agreement shall be construed and interpreted, and the rights of the Parties determined in accordance with the laws of the State of Missouri, without regard to any choice of law rules.

11. De-identification of Data. This provision should only be used if Vendor insists on the use of information it collects or has access to for purposes other than as necessary for performance under the agreement.] Vendor may, upon prior written consent of District for each such use, use information collected or accessed by it under this agreement if, and only if, Vendor de-identifies the information so that the information is no longer connected or capable of being connected to an individual student or person. The de-identification process shall be provided to and approved in advance by District prior to any such use or de-identification. Evidence of d-identification must be provided to the District within thirty (30) days upon written consent.

VI. PROJECT OVERVIEW & REQUIREMENTS

The purpose of this project is to find a software solution that meets the needs and expectations of Community Education, its students and instructors. The solution should offer the following:

1. Students can easily create and manage their account, locate and register for a class, and make payments.
2. Instructors can view student/class information, communicate with their students, and submit proposals for upcoming classes.
3. Community Education can assist students with their account, registrations and payments, assist instructors with their account and submitting proposals, run reports (rosters, billing, instructor payment due, transactions, balance due, etc.), reconcile accounts, build classes, etc.,

REQUIREMENTS AND SUPPLIER CAPABILITY

RESPONSE KEY

YES	Yes, this feature is available as part of the standard package
YES-P	Yes, only partially
YES-C	Yes, this feature is available but requires customization
FR	This feature will be available in a future release (within the next 6 months)
NO	This feature is not available in the system
N/A	Not applicable

Please provide as much information as possible in the details section of the requirements.

Requirements	Response	Details
Single Sign-on/SAML for staff		
Accepts PHSD data privacy agreement		
SFPT secure file transfer		
Responsible for historical data migration (customer data, class data, program data, scheduling data...		
Set-up of historical data such as terms, courses, rosters...		
Ability for instructors to easily access their instructor portal		
Instructors can access student information through their instructor portal		

Requirements	Response	Details
Instructors can submit course proposal(s). Information includes: instructor name, title, description of the course, # of sessions, date(s), day(s), time range of class, min/max #'s, class fee(s), etc.,		
CE controls the amount of student information the instructor has access to (system allows for role-based security to limit who sees what)		
Instructor can retrieve their class information, roster & take attendance online		
Instructor can email their class(es) & attach necessary files		
Instructor can update their personal information (address, phone number, email, password, etc.,) via the online instructor portal		
CE can share important information on the online instructor portal "dashboard"		
System provides attendance tracking online		
Mobile-friendly and mobile-responsive (instructor and student portals)		
Students can create an online account		
System will search for accounts before new accounts are created to prevent account duplication		
Additional students/family members can easily be added to an account		
Required fields for registrant: first & last name, address, primary phone #, DOB, login username & password, email address (if none, the ability to select "none")		

Requirements	Response	Details
Required fields for additional members: first & last name, email address (if none, the ability to select "none"), primary phone number, DOB, grade, drop down to choose school the student attends (for marketing purposes)		
Students can retrieve forgotten password online		
When entering a phone number, student chooses whether it's a home, mobile, work or other number		
Students can update personal information online (address, phone number, email, password, etc.,)		
Students can disclose allergy information		
Students can add pick-up info or authorized pick-up persons (this info is visible to instructors as well)		
System will automatically advance a student's grade level after initial entry		
Students can easily search for a class using keywords rather than exact class title		
Students can easily view and register for classes		
Students see class name, class ID, location, date(s), days, times, instructor, fees, option to "view" additional class info, number of available slots & can click on "register" to register		
Student can easily choose which student is registering for the class and system shows if a student is not eligible to register (ex. Student does not fall within the age requirements)		

Requirements	Response	Details
If class is full, it is indicated online, and student is placed on a waitlist		
Provide the ability to pay for multiple classes and or multiple students' classes through one transaction		
Accept online payments via credit card		
Accept online payments via debit card		
Accept online-e-check payments		
Student can view classes they have enrolled in & can view the class dates, times, location, etc.,		
Student can view payments and payment history		
Student can opt out of marketing emails		
Student cannot opt out of receiving receipts, notices from the instructor/CE, etc.,		
Student/CE can designate the school the student attends to ensure we are marketing to the correct audience		
Student can create an account, register and pay for classes & update information via iPhone/Android		
Student receives an automated receipt upon successful registration of a class		
Provide secure access 24 hours a day, seven days a week		
CE can search for students using first, last, email, phone number, birthdate, etc.,		

Requirements	Response	Details
The receipt contains student name, address, phone number, email address, the class name, date(s) of class, location of the class, day(s) of class, amount paid (broken up by tuition & registration fee), any additional info added by CE (ex. Alternate schedule details, alternate location, etc.,) & refund guidelines.		
CE designates required & optional information to be completed by the student (ex. first/last name, guardian name, mailing address, email address(es), phone number(s), gender, birth date, current/last grade completed, allergy information, etc.,)		
CE can create an account for a student & enter a username & temporary password		
CE can update student accounts		
CE can enroll a student in a class(es) & process payment for this class(es)		
An automated receipt/email confirmation is sent after successful registration		
Option to print a registration receipt. Receipt should contain the same information as the automated receipt and look the same.		
Registration receipt appears the same regardless of self-registration or CE aided registration		
CE can accept a check or cash as a form of payment		
CE can view classes the student is registered in		
System will automatically waitlist a student without charge if the class is full		

Requirements	Response	Details
CE can change a student's status (ex. Enrolled, Did Not Enroll, Dropped, etc.,)		
CE can email students either individually or as a group by those enrolled in a class, who have taken a class at a certain location, who fall into a certain age group/in a specific grade level, etc.,		
System allows email attachments to be sent		
System allows for configuration of class reminder emails through automation as well as individual class reminders (start date, time, location, supplies, etc.,)		
CE can register a student for a class without requiring payment		
CE can view invoices and adjust fees based on payment method, employee discount, Clay County Senior Discount, Major Savers, etc.,		
System must allow CE to view rosters in different formats or choose the information to be shown on the roster (ex. Name, phone number, email, allergy info, pick-up info, etc.,)		
CE must be able to export class information in various formats like excel, rich text, pdf, etc.,		
CE must be able to designate different catalog sessions (ex. Winter 2020, Summer 2020, etc.,)		
CE must be able to enter class information such as class name, description, dates, days, times, # of sessions, fees, instructor name, etc.,		
CE can enter class location and alternate class location if there is room change on a certain date		

Requirements	Response	Details
CE must be able to assign a class to a specific catalog session		
Ability to clone a class section to include the tuition		
Allow CE to require (Terms & Conditions) the completion of a waiver liability, a form, obtain additional information and/or require student to read important information prior to registering for specific classes		
Require student to read a statement of understanding prior to signing up for specific classes		
Allow CE to list a class under a "course category" created by CE (ex. Crochet class would fall under Adult: Arts & Crafts)		
CE can change registration status of the student (ex. Enrolled/Active, Not Enrolled, Course Cancelled, etc.,)		
CE can control the date(s) a class is visible online		
CE can control the date a class(es) is eligible for registration		
CE can retrieve & update instructor information (name, address, phone number, email, social security number, vendor number, etc.,)		
CE can update/change an instructor's username/password		
CE can change an instructor's status (ex. Active, inactive, etc.,)		
CE can email instructor's individually or as a group utilizing their status (ex. Active, inactive, etc.,)		
CE can make notes in a student's account that is not visible to the student		

Requirements	Response	Details
CE can merge accounts if there is a duplicate account		
System must allow for ease of searching a class by session, course code, title, keywords, etc.,		
System must allow CE to view the session, course code, title, status (offered, cancelled, etc.), min, max, enrolled count, waitlist count, days, start/end date, start/end time, instructor, etc.,		
System must allow CE to designate required fields for instructor proposals (ex. course title, course description, day, dates & times of the class, min/max enrollment numbers, cost of the course, miscellaneous information, etc.,		
System must allow CE to view and edit instructor proposals		
System must allow CE to designate its own course and section IDs for each class		
System must allow for enough character spacing so class title & description can be entered without abbreviations		
System must allow CE to assign multiple "class categories" to a class to make it easier for students to locate a class		
System must allow CE to view classes in a calendar view that lists all classes for the day, not just when the class first begins		
System must allow non-class dates to be entered in the system. These dates must show on the customer receipt & the catalog/brochure		
Accept credit/debit card, e-check, check and cash processing		

Requirements	Response	Details
System must allow CE to enter/change course & section ID, session, class status, start/end dates, no class dates, start/end times, class day, hours per class, total number of classes & weeks, min/max enrollment numbers, min/max age requirements, location of the class, instructor, instructor pay rate, instructor pay by method (by student/by hour), display options (online dates, fees, available slots, class minimums, alternate schedule/email information, etc.,)		
Accept discounts (employee, Major Savers...)		
System must allow for CE to designate a student as a Clay County resident & run a report to isolate these individuals during a specific time period		
System must allow CE to offer a credit to the account in lieu of a credit/ debit card or check refund		
System must allow CE to add a registration/convenience fee or the system to automatically enter the designated registration/convenience fee		
System must allow CE to add class fee (tuition) information		
System must allow CE to retrieve a URL specific to each class to share with customers		
System must allow customer to keep credit card/debit card information on file to be used in the future		
System must apply an account credit towards the total enrollment fee and then charge the customer for the remaining balance if there is one		

Requirements	Response	Details
My Cart – Allow for donations. Verbiage – Please consider making a donation to help bring great educational opportunities to all in our community		
System must offer a report showing instructor payment amount for a specific class		
Allow credit card payment – major credit cards accepted		
Allow debit card payment		
Allow check/e-check payment		
Allow cash payment – if unable to give change, allow overpayment with remaining balance credited to account		
Allow gift certificate to be purchased		
Allow gift certificate to be allocated to an account in the form of a credit		
Ability to issue refunds in the form the payment was made		
Ability to issue multiple refunds using the same credit card on the same day		
Refunds – if payment was made via check/cash, allow refund source to indicate check refund		
Ability to insert notes regarding a refund		
Allow customers to store multiple card or bank account information to pay fees		

Requirements	Response	Details
Allow easy method for full and partial customer refunds		
Allow for partial refunds to a credit card and the ability for the remaining amount to be transferred to a different class		
Allow easy method for voided sales		
System must automatically email students who register online, an email confirmation which includes student information, the class they enrolled in, the fees, payment information, all pertinent class information, payment details, alternate schedule details, alternate class information, refund information, etc.,		
System must automatically email students who are registered by CE, an email confirmation which includes student information, the class they enrolled in, the fees, payment information, all pertinent class information, payment details, alternate schedule details (ex. classroom change on a certain date), alternate class information (ex. list of items to purchase prior to the class), refund information, etc.,		
Include easy reconciliation		
Include transaction report to isolate income received from a specific payment method during a specific time period		
Include reporting on accounts with a balance due		
Include reporting capability based on building, class, or account		

Requirements	Response	Details
System must allow CE to run a "staff invoice" based on an individual class showing instructor information (including address), the class information, the number of students registered, amount the instructor receives per student enrolled and the total payment the instructor should receive		
Include a report showing the total number of registrations within a given time period		
System must allow CE to run a report showing the course code, title, instructor, location, min/max enrollments, dates, times, and days sorted by date of the start of class		
System must allow CE to run the entire session's catalog/brochure in rich text, pdf, excel, etc., form (ex. catalog for winter/spring 2020 session) in one, two or three columns that include all pertinent class information as well as non-class dates		
Provide a faster support turn-around time for the first 3 months through implementation & go-live. Support should be prioritized over existing customers.		
Provide fully documented training materials		
Provide documentation for software enhancements		
Maintain a help desk in operation during normal business hours		
Allows for multiple users to manage accounts		
Support must be accessible via phone, email, support ticket, etc.,		

Requirements	Response	Details
Provide assistance and tracking for returned checks and insufficient funds		
Include no upfront fee or monthly fee to PHSD		
Allow for implementation in phases if needed		
Ability to separate program revenue and expenditures; including on account credit and refunds		
Ability for students to check in/out through iPad, tablet or bar code scanner		
Ability to swipe credit cards on site		
Role based permissions and access (example: super user, regular user, instructor, student)		

VII. PROVIDER QUALIFICATION

ABOUT THE PROVIDER

Please supply a brief description of your company, including the number of years in operation and the number of employees.

Click here to enter text.

INDUSTRY EXPERIENCE

Please describe your experience in providing School Payment Management Software Solutions.

Click here to enter text.

RESEARCH AND DEVELOPMENT

Please describe what resources your company invests in research and development of your product(s).

Click here to enter text.

PRODUCT UPDATES

Please describe your current product update methodology. Please make sure you include frequency of updates, customer impact and examples of recent enhancements.

Click here to enter text.

DIFFERENTIATION

Describe what you think differentiates your organization from other industry providers.

Click here to enter text.

PROPOSED PROJECT TEAM

Please provide information about the implementation team and departments involved in delivering the proposed solution to the Park Hill School District.

Click here to enter text.

OTHER PRODUCTS AND SERVICES

Please list and briefly describe any products and services that you provide outside of your proposed School Payment Management Software Solution.

Click here to enter text.

CUSTOMERS

Please supply a sample list of similar active clients.

Click here to enter text.

PARTNERING

Provide the names of any partners and/or subcontractors relevant to this RFP. Please describe their role in the response.

Click here to enter text.

VIII. PROPOSED SOLUTION

PRODUCT

Product name	Click here to enter text.
Brief description	Click here to enter text.
Current version	Click here to enter text.
Year released	Click here to enter text.
Hardware Requirements	Click here to enter text.

SECURITY AND COMPLIANCE

Please describe your security model and compliance procedures in detail.

Click here to enter text.

CUSTOMIZATIONS

VARIED OR ADDITIONAL OPTIONS

Describe any proposed additions or variations to the solution presented.

Click here to enter text.

SERVER REQUIREMENTS

Please describe the hosting environment for your software.

Click here to enter text.

LICENSING

Please describe your licensing model.

Click here to enter text.

IX. IMPLEMENTATION

IMPLEMENTATION PLAN

Provide a plan outlining the likely timeline for implementation, including meetings to discuss progress.

Click here to enter text.

TRAINING

Please describe the training procedure for each group of users.

Click here to enter text.

SUPPORT SERVICES

Please describe the technical support processes and the options available for your proposed solutions. Outline your escalation process and typical response times. Attach your recommended service-level agreement to the supporting documents section.

Click here to enter text.

PROCESSING FEES

Please supply a list of the processing fees associated with each form of payment as detailed in the table below.

Form of Payment	Fee or Percentage
Credit Card Payments	
Debit Card Payments	
E-Check Payments *The District would prefer to not have a fee assessed for e-check payments	

XI. SUMMARY

Number of calendar days for delivery after receipt of Purchase Order: _____

In submitting a response to this document, vendor acknowledges acceptance of all sections of the entire document and has clearly delineated and detailed any exceptions.

Signature: _____ **Title:** _____

Printed Signature _____ **Date:** _____