

SANTA FE PUBLIC SCHOOL DISTRICT

**Proposal No. 9 - General 2014-15,
Data Warehousing and Visualization Services**

SUBMIT PROPOSAL TO:

Santa Fe Public School District
Educational Services Center
Purchasing Dept.-Room 204A
610 Alta Vista Street
Santa Fe, New Mexico 87505
(505) 467-2010 or 11

**DEADLINE DATE: January 20, 2015 at
3:00 PM Local Time**

Offeror (Company)	Address	City	State	Zip Code
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Signature of member authorized to sign for firm (Title).
(I certify that I have proposed according to the specifications
and conditions of this proposal).

Doing Business under the Company Name of:

Telephone Number with area code

Facsimile Number with area code

**Proposal must be submitted in as sealed envelope with
The outside marked: Proposal No. 9 - General 2014-15,
Data Warehousing and Visualization Services
Include Company Name and Address**

(There are 8 pages plus cover page, table of contents and Attachment A to this proposal).

It is the practice of the Santa Fe Public School District to purge our bid list every two years. If we have had no response from a vendor in those two years, that vendor is removed from our mailing list).

This Request for Proposal (RFP) is being issued pursuant to The New Mexico Procurement Code Sections 13-1-28 through 13-2-199 NMSA 1978 which imposes civil and criminal penalties for its violation. In addition, the New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities and kickbacks.

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Proposal #9, General 2014-2015 Data Warehousing and Visualization Services

Introduction

Santa Fe Public Schools ("SFPS" or the "District") is soliciting proposals for data warehousing and visualization software and services. As described in the Scope of Work, key elements of this RFP include providing data connection, extract-transform-load (ETL), visualization, and warehousing software and services.

This proposal will be available to any school district and or government agency upon awarded authorized company/individual approval. It will be the responsibility of the school district and or government agency using the agreement to be in compliance with New Mexico Procurement Code.

Term

The proposal term for the 2014-2015 fiscal year is approximately February 1, 2015 through June 30, 2015. There will be an option to renew each year for three years. Optional renewal years will be upon mutual agreement by contracting parties, SFPS and contractor, July 1st to June 30th, provided funds are available. A contract will be negotiated each fiscal year.

Submission of Proposal

Five documents (1 original and 4 copies) of the completed proposal must be submitted in a sealed envelope addressed to the Santa Fe Public Schools, Educational Services Center, Purchasing Dept., Room #204A, 610 Alta Vista, Santa Fe, NM 87505. The front-outer sealed envelope shall have the notation "Proposal #9, General 2014-2015, Data Warehousing and Visualization Services." Include company name and address. Also include an electronic version of the documents on a thumb drive or CD as well.

Proposal Deadline

January 20, 2015 at 3:00 p.m. Local Time. Proposals received after the deadline are considered non-responsive and will therefore not be accepted.

Scope of Work

The contractor shall:

1. Provide Extract-Transform-Load (ETL) Services from SFPSD's existing student information system (Pearson PowerSchool, NOT Chauncery SMS)
 - a. Upload / synchronization must be at least nightly
2. Provide a data warehouse to store, in a consistent manner, SFPSD data
3. Provide additional methods for data to be stored in the data warehouse
 - a. Provide the ability for data to be manually entered via a web-based interface in a secure fashion
 - b. Provide the ability for text extracts in a consistent format to be uploaded
 - c. Provide ETL services from other information systems.
4. Provide easy to use online visualization and data warehousing of student/staff data in multiple domains, such as attendance, discipline, assessment, grades, and others to be determined
 - a. SFPSD will begin with academic data, but will eventually add in finance and HR data
 - b. Vendor should have the capacity to integrate and interface with new and existing technologies
5. Provide FERPA-compliant access to data, where each user is only able to see data authorized for that user
 - a. This must include the ability to easily limit teacher's views of data only to their current roster of students.
6. Provide either Single or Synchronized Sign On access to SFPSD staff, including teachers
 - a. SFPSD uses Microsoft Active Directory and is contemplating Google Apps for Education
7. Customize any proprietary software tools for use by SFPSD staff
8. Provide access to data reporting / visualization using Commercial Off-The-Shelf software.
 - a. Any solution should allow SFPSD central office staff to create interactive reports / views and publish them to other users, such as teachers, who do not need to know how to create such reports / views
9. Provide a standard set of easy to use attractive and useful reports / visualizations.
 - a. Report / Visualization topics should be both content and data quality based.
 - b. Contractor should show evidence that reports have been updated over time to keep up with needs of school districts
10. Provide training / professional development services for SFPSD central office staff on creating reports / visualizations

11. Provide documented process with step by step instructions for all training material with appending updates as new information or process changes are implemented
12. Maintain a current living document of Performance Goals agreed upon within the proposal as well as all Service Level Agreements
13. Agree to all penalties for any breach in Service Level Agreements and nonperformance periods

Amendments to RFP

If there are any amendments to the RFP, they shall be in writing from the SFPS Purchasing Dept. and shall be mailed or emailed to all firms and individuals who received the RFP. Amendments shall be distributed with sufficient time to allow offerors to consider the amendments in preparing their proposals. If necessary, the deadline for submission of proposals shall be extended by the amendment.

Cancellation of RFP and Rejection of Proposals

The Santa Fe Public Schools reserves the right to cancel this RFP at any time and for any reason.

The Santa Fe Public Schools reserves the right in its sole discretion to reject any and all proposals in whole or in part. The Santa Fe Public schools shall not be responsible for the payment of any cost incurred by the offeror in the preparation or submission of a proposal.

Award

Proposal shall be a single source award to the highest ranked successful offeror. The Santa Fe Public Schools may interview any organization submitting an acceptable or potentially acceptable proposal. However, a contract may be awarded without such interviews.

Records

The contractor will be required to maintain usual and customary records for work completed to be negotiated in contract.

Billing

Invoices shall have detailed complete line item information such as Purchase Order number, date of services, costs, etc. (as determined by the District Business Office) and must be submitted on a monthly basis to the Accountability & Strategy Office.

Payment

Payments will be made on a monthly basis following the review of invoices by the District Business Office.

Insurance

Contractor shall have at his/her own expense a minimum of \$2,000,000 General Liability Insurance.

Proposal Evaluation Process

Proposals will be evaluated by a selection committee of SFPS District staff, facilitated by the Chief Information and Strategy Officer. Top-rated proposals may be interviewed by selection committee members. This interview would allow the committee to ask questions and promote a better understanding of written materials and will not be given points. The contents of any proposal shall not be disclosed so as to be available to any competing contractor(s) applying for selection.

Each proposal shall be evaluated by the Selection Committee as indicated in the above paragraph for a possible 100 points using the rating criteria listed in this proposal. The Selection Committee will evaluate the overall proposals based on the written proposal. The written proposal will receive a maximum of 100 points. The Contractor with the highest ranking will be awarded the proposal.

Contract Approval: Upon award and Board approval, the awarded contractor(s) will be notified in writing by the Purchasing Manager. A contract will be negotiated and upon agreement by both parties (SFPSD and awarded contractor) a contract will be issued to the awarding Contractor and approved as to form, legal sufficiency and budget requirement by the SFPSD. A contract will not be effective until completed with authorized signatures, and approved purchase orders issued and signed by the SFPS Business Office.

All overall committee records are public record and will be available for public inspection at the Purchasing Office after a contract and an approved purchase order from the Business Office has been issued to the awarding Contractor. Individual scores and ranking by each committee member shall be confidential.

Proposal Format

Any proposal deemed non-conforming by the selection committee in regards to format will be considered non-responsive and will require mandatory disqualification for the proposal.

1. Proposal Organization – For each proposal all pages must be numbered. Each proposal shall be organized in the same order as the evaluation criteria. Tabs for each evaluation criteria are required.
2. Submittal Letter – Each proposal must be accompanied by a submittal letter. Each submittal letter must:
 - a. Identity of the submitting business.
 - b. Be signed by a person authorized to contractually obligate the offeror.
 - c. Include introduction stating organizational history, core values, mission statement and experience (two page maximum).
 - d. Include a description of how the Contractor will meet or exceed Scope of Work requirements as stated on pages 2 and 3 (two page maximum).
 - e. Contain a statement that the Contractor shall comply with Santa Fe Living Wage Ordinance for services provided in the Santa Fe Public School District.
 - f. Contain a statement that the Contractor shall comply with government (federal, state, city county, etc.) rules and regulations, including Megan’s Law.

MANDATORY SPECIFICATIONS:

Failure to include the following shall constitute a non-response and require mandatory disqualification of the proposal:

1. Submittal Letter – proposals must include a signed submittal letter.
2. Agency’s most recent fiscal year budget or financial summary.
3. Five-year summary of comparable jobs, including gross budget for each.
4. Three applicable job references with full contact information.
5. Provide a project management plan and overall timeline for deliverables.
6. General Liability Insurance – Evidence of General liability Insurance in the minimum amount of \$2,000,000 must be included in the proposal in the form

of a current Certificate of Insurance. For purpose of this proposal only, documentation should identify the Santa Fe Public Schools as the additional insured.

7. Campaign Contribution Disclosure Form – Pursuant to Chapter 81, Laws of 2006, and prospective Contractor seeking to enter into a contract with any state agency or local public body must file the Campaign Contribution Disclosure Form (See Attachment A) with the state agency of local public body. This form is to be completed, signed and included with the proposal.

Proposal Evaluation Criteria

A maximum total of 100 points are possible in scoring each proposal for the evaluation. The Selection Committee will evaluate the proposals based on the criteria listed below, and may conduct interviews with vendors applying for selection.

1. Experience, knowledge and reliability in providing Data Warehousing and Visualization services in educational environments..... **35 points**
2. Contract cost and cost proposal: **20 points**
3. Contractor project management ability: **10 points**
4. Understanding of Scope of Work: **35 points**

List of Evaluation Factors

Experience, Knowledge, Reliability – Demonstrate through historical documentation that the vendor has experience providing Data Warehousing and Visualization services in an educational environment. Indicate the relationship of the work in this RFP to the vendors’ other current and past programs by providing records of current and previous contracts, including experience in this field. Provide information regarding the success of similar past projects and contracts to include client satisfaction. Three references of past clients receiving similar services should be included.

Contract Cost and Cost Proposal – Demonstrate clearly, in itemized format, the projected costs of the services required. Indicate requirements and associated costs. Provide an overall cost for the entire proposal. Demonstrate past ability to meet Scope of Work expectations within budget specifications through past projects. In addition to the proposal, actual cost to SFPS will be considered.

Contractor Project Management Ability – Contractor shows ability to manage similar projects in educational settings through documentation of current and past successful contracts.

Understanding of Scope of Work – Describe in detail the anticipated scope of work and the factors to be considered to effectively meet or exceed the Data Warehousing and Visualization needs of SFPSD. Describe in detail how the vendor will meet said needs. Include information about school and district needs, program administration, scheduling, integration, software, hardware, training, budget, and ease of use. The proposal should be comprehensive and demonstrate competent knowledge of program requirements.

General Conditions

Procurement law requires sealed bids or proposals; therefore, SFPS cannot accept proposals which are transmitted using facsimile equipment.

Improper identification may result in premature opening of or failure to consider the material. All requirements must be addressed in your proposal. Non-responsive proposals will not be considered.

SFPS will not be responsible for proposals from offerors that are mailed and or hand delivered that arrive late.

Offeror's, firms, companies, must have at their own expense General Liability insurance required for this project.

The issuance of the RFP, the receipt of proposals or the selection of a contractor/firm or individual in no manner obligates the SFPS to the eventual purchase of services. This process is solely at the discretion of the SFPS and may be terminated without penalty or obligation at any time prior to the signing of written contract.

The SFPS shall not be responsible for the payment of any costs incurred by the offeror in the preparation or the submission of a proposal.

SFPS reserves the right to contact the references listed in this RFP.

Offeror/contractor must comply to all government rules, regulations, laws including Megan's Law.

The SFPS shall not be responsible for proposals that the district mails or emails to the offerors.

Contractor shall comply with the Santa Fe City Living Wage Ordinance for services provided in the Santa Fe Public School District.

Protest – any bidder, offeror or contractor who is aggrieved in connection with a procurement may protest to the Purchasing Department of the Santa Fe Public School District. The protest shall be submitted in writing within 15 calendar days after the fact occurrence giving rise thereto.

Sequence of Events (Tentative Timeline)

January 9, 2015	RFP Available
January 20, 2015	Proposal Deadline by 3:00 p.m. local time to the Purchasing Office, Room 204A, 610 Alta Vista, Santa Fe, New Mexico, 87505.
January 21	Review Proposals and complete possible interviews with Selection Committee making possible selection
January 27	Board of Education Approves Award
January 28	Contract Negotiations
February 4	Board of Education Approves Contract (if req'd)
February 5	Contract Begins

All dates after Proposal Deadline are tentative and may change.

**SANTA FE PUBLIC SCHOOLS
CONTRACT ATTACHMENT**

DISCLOSURE OF CONTRIBUTIONS

"Prospective contractor" means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

"Representative of a prospective contractor" means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

DISCLOSURE OF CONTRIBUTIONS:

Contribution Made By:

Relation to Prospective Contractor:

Name of Applicable Public Official:

Date Contribution(s) Made:

Amount(s) of Contribution(s):

Nature of Contribution(s):

Purpose of Contribution(s):

(The above fields are unlimited in size)

Signature

Date

Title (position)

-OR-

NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTYDOLLARS (\$250) WERE MADE to an applicable public official by me, a family member or representative.

Signature

Date

Title (Position)