

# NORTH PENN SCHOOL DISTRICT

Lansdale, PA 19446

## NOTICE TO VENDORS

### **AI Application to Support Teaching and Learning**

#### Proposal Summary

North Penn School District (NPSD) is hereby soliciting vendors/contractors to submit proposals for: **“AI Application to Support Teaching and Learning”**

You are invited to provide a proposal to address the District’s needs to implement an **AI Application to Support Teaching and Learning** and to support the district’s efforts for the digital learning program in compliance with COPPA. This Request for Proposal (RFP) states the overall scope of products and services desired, specific software functionality, technology foundation as well as desired Vendor qualifications. Before submitting a proposal, Vendors shall examine the specifications in order to understand all existing conditions and limitations.

#### Response Instructions

The submitted proposal must follow the rules and format established within this RFP. Adherence to these rules will ensure a fair and objective analysis of all proposals. All proposals shall be submitted on the enclosed District forms, with a hard copy and all completed forms submitted in a sealed envelope bearing the title

**“AI Application to Support Teaching and Learning”** and an electronic copy of all documents being submitted on a USB drive. Each Vendor shall be responsible for all costs incurred in order to prepare and submit their response to this RFP. To ensure a fair and objective evaluation of all proposals, **vendors are required to submit all inquiries to the project contact listed below for this RFP.**

Vendors can submit proposals for a single solution or all solutions defined in the RFP. The proposal package must also include:

- Completed and notarized Vendor’s Qualification Statement.
- Completed Vendor’s Proposal Form
- Completed Pricing and Services Form
- USB Drive with copies of all documents being submitted.

The North Penn School District is exempt from Pennsylvania state sales tax.

#### **PROPOSAL SUBMISSION:**

Proposals will be accepted for the **“AI Application to Support Teaching and Learning”** until the date of **May 10, 2024, at 2:00 p.m.** The proposals will be opened at 2:00 p.m. the same day.

**All completed proposal documents and forms must be clearly labeled “AI Application to Support Teaching and Learning” and delivered to Dawn Johnston at the address listed below.**

**It is the sole responsibility of the Vendor to deliver their RFP by the designated date/time. Any proposal received after the due date and time shall be eliminated from consideration.**

#### **PROJECT CONTACT:**

*All questions regarding this proposal should be directed to: [NPprocure@npenn.org](mailto:NPprocure@npenn.org)*

#### **PROPOSALS SHOULD BE SENT TO:**

Dawn Johnston, Purchasing Supervisor

Educational Services Center

401 E. Hancock St.

Lansdale, PA 19446

215-853-1011

# NORTH PENN SCHOOL DISTRICT

Lansdale, PA 19446

## **General Conditions for Proposal**

1. The North Penn School District Board of School Directors invites vendors to submit proposals for the **AI Application to Support Teaching and Learning**.
2. **Proposals will be accepted until 2:00 pm on Friday, May 10, 2024. The proposals will be opened at 2:00 PM on May 10, 2024.**
3. Vendors are not to contact any member of the Evaluation Committee, or any member of the District staff and its elected officials, except as provided herein regarding this proposal until such time as a contract has been awarded.

### **Questions concerning any portion of this RFP shall be directed in email to the below-named individual who shall be the official point of contact for this RFP.**

All questions must be submitted via email to ([NPprocure@npenn.org](mailto:NPprocure@npenn.org)) by May 3, 2024, as stated in the Anticipated Timeline in the “**Scope of Work & Supplementary Conditions**”. Email subject must contain subject “**AI Application to Support Teaching and Learning**.”

The proposal must be submitted **ONLY** to **Dawn Johnston, Purchasing Supervisor, by way of one COMPLETE signed hard copy and one USB drive copy of all documents. They should be sent to Mrs. Johnston at the Educational Services Center located at 401 East Hancock Street, Lansdale, PA 19446 and clearly labeled, “AI Application to Support Teaching and Learning”**

4. Proposals shall be submitted on the enclosed forms. Proposals must be typewritten or written with ink and signed by the individual, partners, or corporate officer.
5. The successful vendor shall present a proposal in strict accordance with the specifications as set forth. **Work consists of implementing an AI Application to Support Teaching and Learning** and to support the district’s efforts for the digital learning program in compliance with COPPA. See “**Scope of Work & Supplementary Conditions**” **starting on page 8 for further explanation and instructions.**

Said Vendor will also be required to provide ACH payment information and a completed W9.

6. Vendors should submit all the information and documentation requested in Section 2 (Vendor Proposal Information) of this RFP. Most subsections require a narrative description and then also have questions listed in a table format for ease of evaluation. All responses should be added to this document or submitted as a separate Word document with the subsections clearly identified.
7. The North Penn School District reserves the right to reject or accept any or all proposals or any portion thereof and to waive any informalities permitted by law. Proposals must remain firm for a period of ninety (90) days from the date of Proposal opening and may not be modified, withdrawn, or canceled by the Vendor during the 90-day time period following the time and date designated for the receipt of proposals.
8. Successful vendors shall insert a quote for each of the Criterion on Page 13 as well as completing responses to all other questions. The price inserted must be net.

*Continued: General Conditions for Proposal*

Proposal Title: **AI Application to Support Teaching and Learning** Due Date: **Friday, May 10, 2024**

9. Proposals may be awarded on an item-by-item basis.
10. A purchase order issued by the School District covering any or all items included in this proposal shall constitute a contract binding upon the vendor and the School District.
11. No charge will be allowed for federal, state, or municipal sales or excise taxes, for which the school district is exempt by law. The proposal price shall be net and shall not include the amount of any such tax. Exemption certificates, if required, will be furnished on forms provided by the vendor/contractor.
12. **INVOICING:** Invoices must be submitted for each individual school, completely itemized, and covering each shipment. No photocopy of a Proposal or Purchase Order will be accepted in lieu of an itemized invoice.
13. **DISCRIMINATION PROHIBITED:** According to Section 755, Public School Code of Pennsylvania, 1949 as amended, the Vendor/Contractor agrees:
  - 13.1 That in the hiring of employees for the performance of work under this contract, or any sub-contract hereunder, no Vendor/Contractor, subcontractor, nor any person acting on behalf of such Vendor/Contractor or subcontractor, shall, by reason of race, creed or color, discriminate against any citizen who is qualified and available to perform the work to which the employment relates;
  - 13.2 That no Vendor/Contractor, subcontractor, nor any person on his behalf, shall in any manner discriminate against or intimidate any employee hired for the performance of work under this contract on the account of race, creed or color;
  - 13.3 That there may be deducted from the amount payable to the Vendor/Contractor under this contract, a penalty of five dollars (\$5) for each person for each calendar day during which such person was discriminated against or intimidated, in violation of the provisions of this contract; and,
  - 13.4 That this contract may be canceled or terminated by the School District, and all money due or to become due hereunder may be forfeited, for a second or any subsequent violation of the terms and conditions of the contract.
14. **HUMAN RELATIONS ACT:** The provisions of the Pennsylvania Human Relations Act, Act 222 of October 27, 1955 (P.L. 744) (43 P.S. Section 951 et. seq.) of the Commonwealth of Pennsylvania prohibit discrimination because of race, color, religious creed, ancestry, age, sex, national origin, handicap or disability, by employers, employment agencies, labor organizations, contractors and others. The Vendor/Contractor shall agree to comply with the provisions of this Act as amended that are made part of this specification. Your attention is directed to the language of the Commonwealth's non-discrimination clause in 16 PA Code 349.101.
15. **COMPETENT WORKERS:** According to Section 752 of the Public School Code of 1949, no person shall be employed to do work under such contract except competent and first-class workmen and mechanics. No workmen shall be regarded as competent and first class, within the meaning of this Act, except those who are duly skilled in their respective branches of labor, and who shall be paid not less than such hours by employers of organized labor in doing of similar work in the district where the work is being done.

16. On proposals for Services involving the furnishing of labor, materials, and/or equipment, while said Services are being performed the successful bidder must maintain in full effect the following minimum insurance coverage:
  - 16.1 Workers' Compensation.
  - 16.2 Comprehensive public liability in the sum of \$100,000 for each person and \$300,000 for each accident, including contract liability. Such shall be endorsed with a save harmless clause in favor of the North Penn School District, its officers, members, and employees.
  - 16.3 Property damage in the amount of \$50,000.
  - 16.4 Automobile and truck insurance in an amount not less than \$300,000 on account of any one accident, and property damage in an amount not less than \$50,000.
  - 16.5 If special hazards, such as might result from blasting, represent a possibility, these shall be covered by a rider to the policy or policies in an amount of not less than \$50,000.

Prior to the beginning of the Service, etc., to be performed, a certificate of insurance shall be furnished to the School District showing the insurance coverage required above. The Vendor/Contractor shall assume full responsibility for loss of life and property, and injuries to persons, including all employees of the Vendor/Contractor or Subcontractors.

17. **STANDARD OF QUALITY**: The various materials and products specified in the specifications by name or description are given to establish a standard of quality and of cost for bid purposes. It is not the intent to limit the acceptance to any one material or product of lesser quality that would not be acceptable. Where proprietary names are used, whether or not followed by the words "or as approved equal," they shall be subject to equals only as approved by the architect, engineer, and/or School District.
18. **COMPLIANCE WITH POLICY/LAW**: Vendor/Contractor shall comply with all policies, procedures, and regulations of the District as established and amended from time to time as well as all applicable state and federal laws and regulations, including but not limited to the provisions of the Pennsylvania Right to Know Law, 65 P.S. 67.101 et seq., regarding possession of public records by agency contractors. In the event the District receives a request for access to a public record that is in the possession of the Vendor/Contractor, the District shall notify Vendor/Contractor of the request and Vendor/Contractor shall provide the District with the requested record in a timely manner so as to enable District compliance with the Pennsylvania Right to Know Law.
19. **CONFIDENTIALITY**: All documents submitted as part of the Vendor's proposal will be deemed confidential during the evaluation process. There shall be no disclosure of any Vendor's information to a competing Vendor prior to the award of the contract. All applicable information will be subject to public disclosure in accordance with the Pennsylvania Right-to-Know Law, at the award of the contract, cancellation of this RFP, or within 90 days, whichever shall occur first.

**Continued: General Conditions for Proposal**

Proposal Title: **AI Application to Support Teaching and Learning** Due Date: **Friday, May 10, 2024**

Vendor/Contractor shall maintain and provide to the District a current Child Abuse History Clearance as provided by the Pennsylvania Department of Human Services, a satisfactory PA State Criminal History Report, and a Federal Criminal History Record Report (FBI Fingerprinting) for each individual engaged by Vendor/Contractor to provide services who will work in our buildings and may have direct contact with children, including Vendor/Contractor (if an individual).

Vendor/Contractor agrees to comply with the provisions of Act 168 of 2014, Employment History Review Law, and to the extent applicable, Act 126 of 2012, Child Abuse Recognition and Reporting Training.

By signing this form, the Vendor/Contractor acknowledges and agrees to comply with all listed policies and laws.

|               |            |      |
|---------------|------------|------|
| Signature     |            | Date |
| Title         |            |      |
| Printed Name  |            |      |
| Company Name  |            |      |
| Address       |            |      |
| Email Address |            |      |
| Phone Number  | Fax Number |      |

**- END GENERAL CONDITIONS FOR PROPOSAL -**

**Vendor's/Contractor's Qualification Statement**

The Undersigned certified under oath the truth and correctness of all statements and of all answers to questions made hereinafter.

|                         |                     |
|-------------------------|---------------------|
| Submitted by: _____     | Corporation _____   |
| Name: _____             | Partnership _____   |
| Address: _____          | Individual _____    |
| Principal Office: _____ | Joint Venture _____ |
| Phone: _____            | Other _____         |

1. How many years has your organization been in business as a vendor/contractor?
2. How many years has your organization been in business under its present business name?
3. If a corporation, answer the following:
  - a. Date of Incorporation: \_\_\_\_\_
  - b. State of Incorporation: \_\_\_\_\_
  - c. President's name: \_\_\_\_\_
  - d. Vice President's name(s): \_\_\_\_\_
  - e. Secretary's or Clerk's name: \_\_\_\_\_
  - f. Treasurer's name: \_\_\_\_\_
  - g. List names and addresses of all parties holding greater than 10% interest in the corporation.
4. Trade References:
5. Other School District References:
6. Bank References:
7. Contractor must provide a list of a minimum of 10 (ten) references of work completed over the past five (5) years. The references must include the facility's name, a contact name, and phone number for the contact.

8. Dated at this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Name of Organization: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

9. \_\_\_\_\_ being duly sworn deposes and says that he/she is the  
\_\_\_\_\_ of Vendor/Contractor and that answers to the foregoing  
questions and all statements therein contained are true and correct.

**SWORN TO AND SUBSCRIBED**

**BEFORE ME THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_\_\_\_.**

\_\_\_\_\_  
**SIGNATURE OF NOTARY**

\_\_\_\_\_  
**Printed Name Notary Public**

\_\_\_\_\_  
**My Commission Expires**

**NORTH PENN SCHOOL DISTRICT**  
Lansdale, PA 19446

**VENDOR PROPOSAL FORM**

**AI APPLICATION TO SUPPORT TEACHING AND LEARNING**

We, the undersigned, have reviewed the specifications herein for the supply of the listed service(s). We propose to complete the work, in accordance with the attached Proposal Specifications, General Conditions, Supplementary Conditions, and Scope of Work. We understand that the North Penn School District reserves the right to reject any and all proposals and to make awards on the basis of the quality of work as well as price.

The undersigned, as proposal responder, declares that he/she has carefully examined all the items of the Specifications and Instructions herein that he/she fully understands and accepts the requirements of the same, and he/she agrees to furnish the specified items and will accept, in full payment therefore, the amount specified below.

Proposals shall include installation services, and the successful respondent shall obtain all required permits and pay the fees required.

|                      |            |      |
|----------------------|------------|------|
| Company Name         |            | Date |
| Company Address      |            |      |
| Authorized Signature |            |      |
| Printed Name         | Title      |      |
| Phone Number         | Fax Number |      |
| Email Address        |            |      |



**SCOPE OF WORK & SUPPLEMENTARY CONDITIONS**

**SECTION 1: SCOPE OF WORK**

NPSD is asking for proposals to provide an AI Application to Support Teaching and Learning. The proposed solution must include, but not be limited to, the following components listed below in sections 1.4 and 2 in its entirety.

**INTRODUCTION (Section 1)**

**1.1 ANTICIPATED TIMELINE**

Listed below are projected dates and times of actions related to this Request for Proposal (RFP). There may or may not be a formal notification issued for changes in the estimated dates and times. The RFP is available online at <http://www.npenn.org/page/695>. Vendors are responsible for periodically monitoring the web site for any updates relating to this RFP.

|  |
|--|
| <b>SELECTION PROCESS TIMEFRAME</b>                             |
| RFP Issuance April 19, 2024                                    |
| <b>Vendor Virtual Pre-Proposal Meeting May 1, 2024 1:30 PM</b> |
| Deadline for Questions May 3, 2024                             |
| <b>Vendor Proposals Due May 10, 2024, 2:00 P.M.</b>            |
| Vendor Interviews May 16, 17, or 21                            |
| Selection of Vendor TBD  |
| Contract Negotiations TBD                                      |

**1.2 PROJECT GOALS AND BACKGROUND**

The North Penn School District (NPSD) educates approximately 13,000 K-12 students in a 42 square-mile area of Montgomery County, PA. NPSD operates seventeen schools and one credit recovery school and employs approximately 2,110 teachers, administrators, and support staff members. The primary goal of NPSD is the selection, implementation, and operation of an Artificial Intelligence (AI) application to support teaching and learning to meet the District's current and future needs. More importantly, the District will select a Vendor who will grow with the District's needs beyond the initially defined product lifecycle.

The District's Goals Include:

- Deliver a system within the budget that will serve the District well for 3 or more years
- Certify that the Vendor will support all core functionality of the product for the life of the contract
- Streamline the District's AI tool implementation
- Provide appropriate and complimentary reporting and decision support tools
- Acquire a system that operates on a platform that is scalable and efficient to manage and operate over time

### **1.2.1 PROJECT SCOPE**

NPSD is asking for proposals to provide an AI application to support teaching and learning. The proposed solution must include, but not be limited to, the following components listed in section 1.2.1.1. Additional information about the product or service and all associated costs should be shared as outlined in Sections 2-9.

#### **1.2.1.1 SOFTWARE & SERVICES**

- AI Software should include components of
  - Personalized Learning
  - Intelligent Feedback and Assessment
  - Predictive Analytics
  - Accessibility Features
  - Predictive Learning and Adaptability
  - Collaborative Learning Features
  - Gamification and Engagement Tools
  - Ability to set parameters for student use
- Options for Dashboard - Admin Controls and/or User Access
- Options for LMS integration
- Options for Multimodal learning support
- Options for Report Creation
- Ongoing support & maintenance services

#### **1.2.1.2 DISTRICT DEMOGRAPHICS AND STATISTICS**

##### **Enrollment Information at the time of the RFP Publication**

- Student: 13,000
- Staff: 2,110

##### **Current Hardware/Software Environment**

- Desktop Hardware: PC Laptops, Mac Laptops, and Chromebooks are supported for staff, Chromebooks for students
- Desktop Operating System: Windows 11, Catalina+ for Mac, Chrome and Gsuite on Chromebooks
- eMail System: Gmail
- Internet Browser: Chrome, Safari
- Student Information System: Infinite Campus
- Financial Information System: eFinance
- SSO & Rostering: Classlink

### **1.3 RESPONSE INSTRUCTIONS**

The submitted proposal must follow the rules and format established within this RFP. Adherence to these rules will ensure a fair and objective analysis of all proposals. Each proposal will be prepared on the form provided, with a hard copy submitted in a sealed envelope bearing the title “AI Application to Support Teaching and Learning” and an electronic copy on a USB Drive sent with it to the District contact person. Each vendor shall be responsible for all costs incurred to prepare and submit their response to this RFP. To ensure a fair and objective evaluation of all proposals, Vendors are required to submit all inquiries to the project contact noted on the cover of this RFP. Vendors can submit proposals for a single solution or all solutions defined in the RFP.

### **1.3.1 DELIVERY OF PROPOSALS**

Delivery of Proposals: RFPs must be delivered by the date/time specified and to the place stipulated on the cover of this RFP. Hard copies should be delivered to the District contact person and electronic USB Drive copies emailed to the District contact person. It is the sole responsibility of the Vendor to deliver their RFP by the designated time. Any proposal received after the due date and time shall be eliminated from consideration.

### **1.3.2 QUESTIONS AND COMMUNICATIONS**

Questions and Communications: Vendors are hereby notified not to contact any member of the Evaluation Committee, or any member of the District staff and its elected officials, except as provided herein regarding this proposal until such time as a contract has been awarded. Questions concerning any portion of this RFP shall be directed in email to the below-named individual who shall be the official point of contact for this RFP. All questions must be submitted prior to the Deadline for Questions as stated in the *Anticipated Timeline* above. Email subject must contain “AI Application to Support Teaching and Learning” Failure to adhere to this policy may result in disqualification.

*All questions regarding this proposal should be directed to:*

[NPprocure@npenn.org](mailto:NPprocure@npenn.org)

Dawn Johnston, Purchasing Supervisor  
Educational Services Center  
401 E. Hancock St.  
Lansdale, PA 19446  
215-853-1011

### **1.3.3 COMPLETION OF PROPOSAL FORMS**

Vendors should submit all the information and documentation requested in Section 2 (Vendor Proposal Information) of this RFP. Most subsections require a narrative description and then also have questions listed in a table format for ease of evaluation. All responses should be added to this document or submitted as a separate Word document with the subsections clearly identified.

### **1.4 PRICING ELIGIBILITY PERIOD**

All Vendor proposals are required to be offered for a term not less than 90 calendar days in duration. A proposal may not be modified, withdrawn or canceled by the Vendor during the 90 day time period following the time and date designated for the receipt of proposals.

### **1.5 CONFIDENTIALITY**

All documents submitted as part of the Vendor’s proposal will be deemed confidential during the evaluation process. There shall be no disclosure of any Vendor’s information to a competing Vendor prior to award of the contract. All applicable information will be subject to public disclosure in accordance with the Pennsylvania Right-to-Know Law, at the award of the contract, cancellation of this RFP, or within 90 days, whichever shall occur first.

### **1.6 EVALUATION CRITERIA**

The District intends to enter into a long-term relationship with a well-established Vendor whose products, features, design philosophy, support policies, and vision for schools come closest to meeting the District’s needs today *and* tomorrow. The selected Vendor must be a well-established, financially stable firm committed to providing school software solutions. The ideal Vendor will have a significant installed base of school clients and a proven track record of delivering products and services on time and within budget.

The Vendor evaluation process will utilize the following approach:

- Initial Proposal Evaluation to determine Vendors selected for demonstration
- Vendor Demonstration for key stakeholders
- Reference Checks
- Site Visits with Current Clients (as needed)

### **1.6.1 INITIAL PROPOSAL EVALUATION**

The initial evaluation will be based strictly on the Vendor's proposal response and be performed prior to any formal demonstrations, reference checking and/or site visits. Each criterion will be scored using a rubric. Based upon the proposal response Vendors will be evaluated against the following criteria:

- Corporate Viability & Vision
- Ability to Execute Deliverables as Outlined
- Hardware & Cloud-Based Technology availability
- Ease of use of software
- Services available
- Cost

### **FINALISTS EVALUATION**

Further evaluation associated with the finalist Vendors will be performed as follows:

- Conduct Vendor demonstrations, as necessary
- Evaluate Vendor viability and vision for the education market
- Evaluate ability for Vendor to respond to district needs
- Evaluate implementation and support approach
- Evaluate functionality
- Perform reference checks and conduct site visits at the discretion of the selection committee

### **1.7 EVALUATION & RESERVED RIGHTS**

Evaluation of the proposals is expected to be completed within 30 days after RFP closing. An evaluation team will evaluate proposals on a variety of quantitative and qualitative criteria. It is the District's intention to procure the most functionally complete and cost-effective solution from a growing, viable and financially stable company that will meet both current and future needs.

The District further reserves the right to:

- Reject any or all of the Proposals.
- Issue subsequent Requests for Proposals.
- Cancel the entire Request for Proposal.
- Remedy technical errors in the Request for Proposal process.
- Appoint evaluation committees to review Proposals.
- Seek the assistance of outside technical experts in Proposal evaluation.
- Require modifications to initial Proposals.
- Excuse technical defects in a proposal when, in its sole discretion, such excuse is beneficial to the District.
- Investigate the qualifications of any Proposer under consideration.
- Require confirmation of information furnished by a Proposer.
- Require additional evidence of qualifications to perform the Services described in this RFP.
- Approve or disapprove of the use of particular subcontractors.
- Establish a short list of Proposers eligible for discussions after review of written proposals.

- Negotiate with any, all, or none of the Proposers.
- Solicit best and final offers from all or some of the Proposers.
- Award a contract to one or more Proposers.
- Accept other than the lowest price offers.
- Waive informalities and irregularities in Proposals.

Inability to rank as one of the top Vendors (Initial Proposal Evaluation) will eliminate Vendors from further consideration. Failure to include in the proposal all information outlined herein may be cause for rejection of the proposal. Information and/or factors gathered during interviews, negotiations and any reference checks, and any other information or factors deemed relevant by the District, shall be utilized in the final award. The final award of a contract is subject to approval by the North Penn School District Board of Directors.

**Section 2 Vendor PROPOSAL INSTRUCTIONS**

**Please include the following in your proposal:**

|   |
|---|
| Name of Company                                 |
| Software Brand Name Proposed                    |
| Name of Primary Contact for Follow-Up Questions |
| Contact Phone Number & eMail Address            |

**TRANSMITTAL LETTER**

Please acknowledge that you have received, read and understand all aspects of the RFP and any addendum that may have been released in conjunction with the RFP. Please indicate your willingness to enter into a Not to Exceeds contract. Please provide contact information of those that are authorized to participate in contract negotiations on behalf of your company.

**EXECUTIVE SUMMARY**

**(Section 1)**

Please describe your solution and how it addresses the stated goals of the project. This should be limited to how your proposed solution will directly benefit the District and the unique value that you add. Please avoid the use of boilerplate product information.

**CORPORATE OVERVIEW**

**(Section 2)**

Vendors are required to provide a description of their company so that the District can evaluate the Vendor's stability and ability to support the commitments set forth in response to the RFP. The District, at its option, may require the Vendor to provide additional documentation to support and/or clarify requested information. The Vendor should outline the company's background including a brief description (e.g., past history, present status, future plans, company size, etc.).

|  |
|--|
| <b>QUESTION RESPONSE</b>   |
| Please state the year the Vendor started in the business of selling school solutions?      |
| How many new school contracts do you average annually?                                     |
| Please list and briefly describe any strategic partnerships you have.                      |
| Specify the number of public sector vs. private sector clients.                            |
| Indicate whether the business is publicly held or private.                                 |
| Indicate if the company incurred an annual operating loss in the last 5 years.             |
| What is the current staff turnover rate for your company?                                  |
| What is the Vendor’s customer retention rate?  |
| What is the Vendor’s percentage of annual revenues reinvested into research & development? |

**CRITERIA (Section 3)**

The Vendor is required to provide a response for each system criterion listed below. Please indicate whether the proposed solution(s) addresses this criterion by indicating Yes/No/Custom Quote. For all responses of Yes or Custom Quote, please include a brief narrative describing how the proposed solution meets each criterion. For a Custom Quote, please indicate the approximate additional cost for that feature.

| <b>Criterion Yes/No</b>  | <b>Narrative</b> | <b>Custom Quote</b> |
|--|------------------|---------------------|
| The system must integrate well and be compatible with Google for Education / Google Portal Products  |                  |                     |
| The system must be device and browser independent and must remain current with all new browser versions and new evolving technology              |                  |                     |
| The system shall provide a mobile platform usable by all constituents including administrators, teachers, and students                           |                  |                     |
| The system shall provide data integrity and security   |                  |                     |
| The system shall support single sign-on for all of the Vendor's modules and integrate with Active Directory and/or Google authentication methods |                  |                     |
| The system shall provide updates to data in real-time across all modules included with the solution  |                  |                     |

**TECHNOLOGY (Section 4)**

The Vendor is required to provide a general description of the application program product and how it will meet the requirements of this RFP.

| <b>QUESTION RESPONSE</b>  |
|---|
| Is the product sold on an unlimited user site license basis? If no, please explain.             |
| Is your system web-based?   |
| Is the system integrated with the G Suite or MS Office Products? If so, to what extent?         |
| What hardware platform(s) does the Vendor's proposed application software currently operate on? |
| What web browsers does the Vendor's proposed application software currently operate on?         |

**GENERAL FEATURES (Section 5)**

The Vendor is required to provide a general description of the general features of the system.

| <b>QUESTION RESPONSE</b>   |
|--|
| Is the proposed system scalable? Please provide the smallest and largest install base. |
| Please describe how the system addresses security of the platform.                     |
| Does the system provide role-based security?   |
| Does the system provide menu-based security?   |
| Does the system allow for data security?   |

**IMPLEMENTATION SERVICES (Section 6)**

| <b>QUESTION RESPONSE</b>  |
|---|
| Please describe the Vendor's implementation methodology.  |
| Does the Vendor utilize 3 <sup>rd</sup> party resources or contractors in their implementations? If so, please describe.                            |
| Is the Vendor willing to enter into a Not to Exceeds contract for implementation services? If not, please explain.                                  |
| Will the Vendor agree to waive all fees related to service days if we determine the services to be of unacceptable quality? If not, please explain. |

Please describe your approach and define your deliverables for the following implementation services. It is expected that your proposal includes these at a minimum.

- Project Scope Agreement
  - Project Assumptions
    - Personnel Assumptions
    - Technical Support Assumptions
    - Operational & Knowledge Transfer
  - General Project Activities and Deliverables
  - Data Conversion Process Steps and Activities
- Change Management Approach
- Communication Plan
- Quality Management and Testing
- Project Risk Management
- Schedule Management
- Resource Management
- Education Plan
- Sample Detailed Project Plan and Gantt Chart
- Timeline

**SUPPORT AND SERVICES (Section 7)**

The Vendor must specify the nature, costs, and conditions of any post-implementation support options including

- On-site support
- Telephone support
- Operating system and database support
- Escalation options and procedures
- Upgrade Assistance
- Availability of user groups

Identify the party or business unit that is responsible for the support options provided above. Additionally, it is requested that the Vendor submit their Help Desk “prioritization” of support calls and their call “escalation procedures.”

Provide information on how server and client-side software updates are received, processed, and distributed to either the server and/or client environment. Describe the delivery method of future updates and product enhancements, the frequency of upgrades and if an accumulative patch process is an option. Also, describe how updates are incorporated with local custom modifications such that custom modifications will not be lost when a new release of the software is applied. The District expects to receive maintenance, as well as functional and technological enhancements as part of their Annual Support Agreement.

| <b>QUESTION RESPONSE</b>   |
|--|
| Does the Vendor agree to waive the first year of application maintenance fees? If not, please explain.   |
| Does the Vendor have a toll-free customer support line? Will the Vendor provide unlimited telephone support as part of their annual support agreement? If not, please explain. |
| Please list the locations of support staff that will be utilized by the District.  |



|  |
|--|
| What are the support hours of operation?   |
| Does the Vendor assign one individual to take ownership of any support issues the District may have?   |
| Does the Vendor provide and maintain a searchable knowledge base of product support materials made available to its client base?<br><br>Does the Vendor provide a customer only web site complete with documentation and software downloads? |
| Will the Vendor provide all periodic enhancements and upgrades to the software at no additional charge, beyond the annual support agreement? If not, please explain.   |
| Does the Vendor offer a service to install and certify all updates for the District in a separate test environment?  |

**Vendor REFERENCE INFORMATION (Section 8)**

Provide two (2) recent clients references of similar size and requirements. Please include the following for each reference:

REFERENCES

|                         |  |
|-------------------------|--|
| Client Name:            |  |
| Contact Name:           |  |
| Contact Title:          |  |
| Contact Phone Number:   |  |
| Contact e-mail address: |  |
| Contract Date:          |  |
| Student Population:     |  |

REFERENCES

|                         |  |
|-------------------------|--|
| Client Name:            |  |
| Contact Name:           |  |
| Contact Title:          |  |
| Contact Phone Number:   |  |
| Contact e-mail address: |  |
| Contract Date:          |  |
| Student Population:     |  |

Additionally, provide one (1) client reference for a district geographically close to the NPSD.

**REFERENCES**

|                         |  |
|-------------------------|--|
| Client Name:            |  |
| Contact Name:           |  |
| Contact Title:          |  |
| Contact Phone Number:   |  |
| Contact e-mail address: |  |
| Contract Date:          |  |
| Student Population:     |  |

14

**COST PROPOSAL (Section 9)**

**(Please Attach a Separate Spreadsheet)**

Costs for the Vendor’s proposed solution should be submitted as an attached spreadsheet. Costs should include the complete costs for the proposed solution. Use additional pages as needed to provide additional cost detail.

The following costs must be included in your response:

- Application software license fees
- Data conversion costs
- Modification costs if denoted to satisfy a requirement
- Implementation, Training & Consulting Services costs
- Annual software maintenance cost for five years
- Estimated Travel Costs (if applicable)
- 3rd Party Software
- Hardware (not required)

No additional charges, other than those listed on the price breakdown sheets, shall be made. All shipping and insurance costs to and from the site shall be included in this proposal. All payments to shipping agents and for insurance fees shall be made directly by the Vendor. The vendor shall be responsible for all arrangements for the shipment of equipment/software to the District’s prepared site. Specific payment terms will be negotiated as part of the final contract. It is expected that certain payments will be made upon delivery of the software with additional payments made based on specific project milestones. The District may during the implementation period or thereafter require modifications, interfaces, conversion or other services from the Vendor. The Vendor agrees to provide a written Change Order describing the work to be performed and estimating the costs, including expenses, for the District’s approval before any work is initiated by the Vendor. The vendor will not exceed the costs set forth in the mutually agreed to Change Orders without justification, in writing that is acceptable to the District.

# NORTH PENN SCHOOL DISTRICT

Lansdale, PA 19446

## Non-Collusion Affidavit

### **Instructions:**

1. This Non-Collusion Affidavit is material to any contract awarded pursuant to this proposal. According to the Pennsylvania Antid-Rigging Act, 73 P.S. 1611 et sec., governmental agencies may require Non-Collusion Affidavits to be submitted together with proposals.
2. This Non-Collusion Affidavit must be executed by the member, officer, or employee of the bidder who makes the final decision on prices and the amount quoted in the proposal.
3. Bid rigging and other efforts to restrain competition, and the making of false SWORN statements in connection with the submission of proposals are unlawful and may be subject to criminal prosecution. The person who signs the Affidavit should examine it carefully before signing and assure himself or herself that each statement is true and accurate, making diligent inquiry, as necessary, of all other persons employed by or associated with the bidder with responsibilities for the associated approval or submission of the proposal.
4. In the case of a bid submitted by a joint venture, each party to the venture must be identified in the proposal documents, and an Affidavit must be submitted separately on behalf of each party.
5. The term “Complementary Bid” as used in the Affidavit has the meaning commonly associated with that term in the bidding process, and includes the knowing submission of proposals higher than the proposal of another firm, any intentionally high or non-competitive proposal, and any other form of a proposal submitted for the purpose of giving a false appearance of competition.
6. Failure to file an Affidavit in compliance with these instructions may result in disqualification of the proposal.

**NORTH PENN SCHOOL DISTRICT**

Lansdale, PA 19446

**Non-Collusion Affidavit Form**

**AI Application to Support Teaching and Learning**

State of \_\_\_\_\_ County of \_\_\_\_\_

I state that I am \_\_\_\_\_ of \_\_\_\_\_  
(Title) (Name of my Firm)

and that I am authorized to make this affidavit on behalf of my firm, and its Owners, Directors, and Officers. I am the person responsible in my firm for price(s) and the amount of this proposal.

**I state that:**

1. The price(s) and amount of this bid have been arrived at independently and without consultation, communication or agreement with any other contractor, bidder or potential bidder.
2. Neither the price(s) nor the amount of this bid, and neither the approximate price(s) nor approximate amount of this bid, have been disclosed to any other firm or person who is a bidder or potential bidder, and they will not be disclosed before the proposal opening.
3. No attempt has been made or will be made to induce any firm or person to refrain from bidding on this contract, or to submit a proposal higher than this proposal, or to submit any intentionally high or non-competitive proposal or other form of competitive proposal.
4. The proposal of my firm is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other non-competitive proposal.
5. \_\_\_\_\_, its affiliates, subsidiaries, officers, directors, and employees  
(name of my firm)  
are not currently under investigation by any governmental agency and have not in the last four years been convicted or found liable for any act prohibited by State or Federal Law in any jurisdiction, involving conspiracy or collusion with respect to bidding on any public contract, except as follows:

I state that \_\_\_\_\_ understands and acknowledges that the above  
(name of my firm)

representations are material and important, and will be relied on by North Penn School District in awarding the contract for which this proposal is submitted. I understand and my firm understands that any misstatement in this affidavit is and shall be treated as fraudulent concealment from the North Penn School District of the true facts relating to the submission of proposals for this contract.

\_\_\_\_\_  
(Name)  
and  
\_\_\_\_\_  
(Company Position)

**SWORN TO AND SUBSCRIBED**

**BEFORE ME THIS \_\_\_\_\_ DAY**  
**OF \_\_\_\_\_, 20\_\_\_\_\_.**

**SIGNATURE OF NOTARY**

\_\_\_\_\_  
**Printed Name Notary Public**

\_\_\_\_\_  
**My Commission Expires**