SOLICITATION, OFFER, AND AWARD

1. Caption	Page of Pages	
Unique Student Identifier (USI) Solution	1	69

2. Contract Number	3. Solicitation Number	4. Type of Solicitation	5. Date Issued	6. Type of Market
	DCGD-2010-R-0042	[ ] Sealed Bid (IFB) [X] Sealed Proposals (RFP) [ ] Sole Source [ ] Emergency	7/28/2010	[X] Open [ ] Set Aside -SBE [ ] Open Market with Set-Aside SBE Designated Category:

7. Issued By:	8. Address Offer to:
DC Office of the State Superintendent of Education Division of Education Excellence 810 1st Street NE, 9th Floor Washington, D.C. 20002	DC Office of the State Superintendent of Education Division of Education Excellence 810 1st Street NE, 9th Floor Washington, D.C. 20002

NOTE: In sealed bid solicitations "offer" and offeror" means "bid" and "bidder"

SOLICITATION

9. Sealed offers in original and 4 copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if hand carried to the bid counter located at 810 1st. Street, NE, 9th Floor until 2:00 PM EDT (Hour) local time 26-Aug-10 (Date)

CAUTION: Late Submissions, Modifications and Withdrawals: See 27 DCMR chapters 15 & 16 as applicable. All offers are subject to all terms & conditions contained in this solicitation.

bid counter located at	A. Name	B. Telephone (Area Code)	(Number)	(Ext)	C. E-mail Address
	Janet Spevak	202	741-5937		Janet.Spevak2@dc.gov

11. Table of Contents - See Page 2 of the RFP

(X)	Section	Description	Page No.	(X)	Section	Description	Page No.
PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES			
		Solicitation/Contract Form				Contract Clauses	
		Supplies or Services and Price/Cost		PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS			
		Specifications/Work Statement				List of Attachments	
		Packaging and Marking		PART IV - REPRESENTATIONS AND INSTRUCTIONS			
		Inspection and Acceptance				Representations, certifications and other statements of offerors	
		Deliveries or Performance					
		Contract Administration Data				Instructions, conditions & notices to offerors	
		Special Contract Requirements				Evaluation factors for award	

OFFER

12. In compliance with the above, the undersigned agrees, if this offer is accepted within 120 calendar days from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified herein.

13. Discount for Prompt Payment	10 Calendar days %	20 Calendar days %	30 Calendar days %	____ Calendar days %

14. Acknowledgement of Amendments (The offeror acknowledges receipt of amendments to the SOLICITATION):	Amendment Number	Date	Amendment Number	Date

15A. Name and Address of Offeror	16. Name and Title of Person Authorized to Sign Offer/Contract

15B. Telephone (Area Code)	(Number)	(Ext)	15 C. Check if remittance address is different from above - Refer to Section G	17. Signature	18. Offer Date
			[ ]		

AWARD (TO BE COMPLETED BY GOVERNMENT)

19. Accepted as to Items Numbered	20. Amount	21. Accounting and Appropriation

22. Name of Contracting Officer (Type or Print)	23. Signature of Contracting Officer (District of Columbia)	24. Award Date
Carole Lee		

Government of the District of Columbia — Office of Contracting & Procurement

DC OCP-209(11-2004)

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Notice to Offeror

This Request for Proposal (RFP) is made in accordance with paragraph 139 of the Blackman Jones Consent Decree which provides, that under the Consent Decree, the District of Columbia "[is] not bound by the D.C. Procurement Practices Act, D.C. Code Section 2-301.01 et seq., any other District or federal law relating to procurement, and any regulations thereunder."

1. INTRODUCTION

The Office of the State Superintendent of Education (OSSE) is seeking to procure a Unique Student Identifier (USI) solution. This solution must assign a USI for each publicly-funded student in the District of Columbia who attends the District of Columbia Public Schools (DCPS), a District of Columbia Public Charter School (PCS), or a nonpublic special education school or programs (NPSs') or is otherwise served under Part B or Part C of the Individuals with Disabilities Education Act, as amended 20 U.S.C. Section 1400 *et seq*. (IDEA). The solution must also have the capacity to assign USIs to other groups such as child care subsidy recipients and pre-school students as well as post-secondary students and career and technical education students. These identifiers will be integrated immediately into OSSE's Special Education Data System (SEDS), Operational Data Store and the Statewide Longitudinal Education Data system and must have the capacity to be used in all relevant data systems currently in the planning stage at OSSE.

The USI solution will provide an automated method for ensuring that each student in the District of Columbia has a unique identifier, thus increasing the accuracy of enrollment data in the Special Education Data System (SEDS), and ultimately across all OSSE systems. Currently, data from DCPS's Student Tracking and Reporting System ("STARS") and the Public Charter School Board's Online Attendance Management System ("OLAMS") is processed manually in order to track enrollment of students in DCPS and PCSs, respectively, and follow the students as they move between different local education agencies ("LEAs") and may be placed by an LEA into a NPS. Only the USI will provide a long-term solution allowing OSSE, as the District's state education agency ("SEA") to properly track, monitor and report on students with disabilities as required by the IDEA.

Having the capacity to track students across LEAs and in NPSs where they must be monitored by a sending LEA has been a central requirement of the Consent Decree (dated August 24, 2006) in the *Blackman Jones* class action lawsuit against the District based on IDEA violations (U.S. Dist. Ct. DC, Civ. Act. 97-1629). Specifically, paragraph 60 of the *Blackman Jones* Consent Decree requires that the District "achieve and maintain an accurate and reliable data system that will allow OSSE to track implementation of hearing officer decisions and settlement agreements (HODs/SAs), and to identify impediments to timely implementation of HODs/SAs." The federal court-appointed Evaluation Team in *Blackman Jones* has repeatedly raised the need for SEDS to track students across LEAs so that OSSE can properly ensure the students' needs are being met in compliance with IDEA. A USI solution is needed in order to accurately and reliably track students within SEDS.

In order to comply with IDEA and the Blackman Jones Consent Decree requirements the USI solution must be applied to all students, and not just those students already receiving special education services, because IDEA compliance timelines begin at the point when a general education student is referred for evaluation and an eligibility determination. Additionally, having a USI solution will allow for the sharing of critical information spanning a student's lifelong public education experience in the District of Columbia, from early childhood through grades K-12, post-secondary education, into adult education and initial years of employment. The primary objectives of the USI are to provide the link that will enable improved tracking of student mobility and growth over a student's entire lifespan in the District of Columbia public education institutions, and to collect and provide the data needed for better planning, trend analysis, performance projections, program evaluation, resource allocation and stakeholder empowerment.

The District Public School System

The Public Education Reform Amendment Act of 2007 (D.C. Law 17-9; D.C. Official Code, Chapter 26), consolidated state-level education functions that were previously performed by the District of Columbia Public Schools (DCPS), the Early Care and Education Administration (ECEA) within the Department of Human Services, the State Education Agency (SEA) at the University of the District of Columbia (UDC) and the State Education Office (SEO) into one agency: the OSSE.

Under this legislation, OSSE also assumed responsibility for compliance with the Blackman Jones Consent Decree. Among other provisions, the Blackman Jones Consent Decree requires OSSE and DCPS to meet certain data specific and non-data specific requirements for special education due process hearing requests, the issuance and, as appropriate, implementation of decisions and settlement agreements resolving complaints and other responsibilities related to the Individuals with Disabilities Education Act (IDEA).

The District of Columbia is the nation's only SEA comprised exclusively of urban LEAs. The following table provides a current overview of the LEAs operating in DC:

LEA Type	LEA Count	Schools/Campuses	Approximate # of Students
District of Columbia Public Schools (DCPS)	1	129	42,500
Public Charter Schools (PCS)	57	99	27,500
Total	**58**	**228**	**70,000**

As the District of Columbia's SEA, OSSE is held accountable by the U.S. Department of Education (USDE) for LEA's compliance with the IDEA. As such, the OSSE Division of Special Education is tasked with overseeing the development and promulgation of state policy governing the provision of educational and related services to students with disabilities; monitoring LEAs for compliance with IDEA as well as other federal and local regulations; allocation and administration of IDEA grant funds to LEAs; provision of training and technical assistance to LEAs; and investigation and resolution of State Complaints relating to Special

Education. The Division of Special Education is also tasked with the responsibility for the regulation of LEAs placement of students with disabilities in NPSs, namely: setting rates for NPSs; issuing Certificates of Approval to NPSs; monitoring the quality of NPSs in which District children are placed; taking corrective action against NPSs not meeting District standards; and budgeting for, processing, and paying the invoices of NPSs.

Creating a USI solution that feeds into SEDS will allow OSSE's Division of Special Education to meet its obligations under IDEA with more accurate and reliable data, which will inform the development and promulgation of policies; will allow the District's reporting to improve; and will provide for better progress monitoring by student and fidelity monitoring across the system as a whole as well as better and more accurate resource allocation and planning.

Project Overview

SEDS is a comprehensive data system designed to support high quality, seamless service delivery for children with disabilities within the District of Columbia. The main objectives of SEDS are:

1. To automate and streamline Individualized Education Program (IEP) development, management, and historical record keeping for LEAs and school sites;
2. To improve service delivery by reducing the burden of paperwork and allowing staff to focus on delivering quality instruction and services to students with disabilities;
3. To support best practice in special education management by providing real-time district-wide reporting, and accurate and reliable state and federal reporting;
4. To facilitate compliance and quality assurance through improved data accuracy, auditing, and timeline management; and
5. To support seamless transitions for students via an improved process for student special education records transfer between schools and districts.

SEDS was initially released to users during School Year 2008-2009, with significant improvements to core modules released in time for School Year 2009-2010, which included improvements to the IDEA eligibility data collected, to ensure alignment with OSSE's Department of Special Education policies; increased progress reporting functionality; and greater flexibility in assignment of related service providers. Training on the SEDS core module improvements was delivered to 902 users in the fall of 2009, with representation from each LEA in the District of Columbia. OSSE also implemented a three-tiered training model for School Year 2009-2010, designed to provide LEAs the strategies and tools to provide all user training on-site through the use of LEA-based trainers. This training model has been replicated for NPSs.

To ensure uniformity of SEDS usage across LEAs, OSSE mandated the use of SEDS by all LEAs via District of Columbia Municipal Regulations in the fall of 2009. *See* 5 DCMR Chapter 30. This mandate supports the goal of optimizing the ability to track the District's delivery of special education services to all students and more rapidly come into full compliance with all federal legal and court mandates for serving students with disabilities.

To improve the completeness and accuracy of federal reporting, SEDS was used as the data source for the submission of the February 2010 Child Count and Educational Environments data required via section 618 of the IDEA. Child Count is illustrative of the type of IDEA reporting OSSE is mandated to provide: it provides the U.S. Department of Education with the number of children with disabilities by race, ethnicity, and disability category, who are receiving a free appropriate public education, the number of children with disabilities, by race, ethnicity, and disability category, who are participating in regular education; and the number of children with disabilities, by race, ethnicity, and disability category, who are in separate classes, separate schools or facilities, or public or private residential facilities. A USI is needed to increase accuracy as students move between LEAs. Because of the District's unique structure – with one geographic LEA and the greatest concentration of charter LEAs in an urban area – student mobility among LEAs is greater here than in most, if not all, states.

SUBMISSION OF PROPOSALS

The OSSE shall review all responses received by 2:00pm on August 26, 2010. Proposals must be submitted in the format detailed in Section 21, below. All proposals must be delivered to:

Office of the State Superintendent of Education
810 First Street, NE- 9th Floor
Washington, DC 20002
Attn: Janet Spevak
RFP: DCGD-2010-R-0042

2. DEFINITIONS/ACRONYMS

ACRONYM	DEFINITION
DCPS	District of Columbia Public Schools (not including public charter schools)
DC STARS	DC Student Tracking and Reporting System – Student Information System used by all DCPS schools.
DE	Dual Enrollment
District	Government of the District of Columbia
ESEA	Elementary and Secondary Education Act of 1965, as amended.
FERPA	Federal Educational Rights and Privacy Act - Imposes limits on disclosure of student records by educational agencies and institutions. States must ensure data is being collected, shared and used in ways that comply with this federal law.
IEA	Intermediate Education Agency (PCSB is considered an IEA).
IEP	Individualized Education Program
LEA	Local Education Agency
NPS	Non-public school or program that enrolls a District funded student with disabilities and is licensed by OSSE

ACRONYM	DEFINITION
OSSE	Office of the State Superintendent of Education - District of Columbia's State Education Agency.
PCS	Public Charter School
PCSB	Public Charter School Board
RFP	Request for Proposal
SEA	State Education Agency - State agency that oversees Local Education Agencies, sets state policies and reports to the U.S. Department of Education on state-level compliance with IDEA and other federal education statutes.
SEDS	Special Education Data System - Used by all LEAs and the SEA in the District to track special education referrals, eligibility determinations, and the development and implementation of Individualized Education Programs (IEPs) as well as other IDEA requirements; to monitor student progress; and to produce user and management reports as well as federal compliance reporting.
SIS	Student Information System
STUI	Staff/Teacher Unique Identifier
USI	Unique Student Identifier – Unique numerical identifier assigned to a student for their entire educational career while in DC.
USDE	U.S. Department of Education

3. APPLICABLE DOCUMENTS

3.i.1. The Public Education Reform Amendment Act of 2007, available at: http://dme.dc.gov/dme/lib/dme/education_reform_bill.pdf

3.i.2. The USI solution shall be compliant with the Office of the Chief Technology Officer's (OCTO) policies, standards and guidelines:

- http://octo.dc.gov/octo/cwp/view,a,1301,q,604425,octoNav,|32782|,.asp
- http://octo.dc.gov/octo/cwp/view,a,1302,q,579820,octoNav,%7C32782%7C.asp
- DC Portal Resource Center Standards Guide

3.i.3. Individuals with Disabilities Education Act of 2004 at: http://idea.ed.gov/explore/view/p/%2Croot%2Cstatute%2C

3.i.4. Blackman Jones Consent Degree at: http://www.bazelon.org/pdf/blackman-CD.pdf

3.i.5. Government of the District of Columbia Standard Contract Provisions for Supplies and Services Contracts at: http://app.ocp.dc.gov/vendors/dcss/pdf/standard_contract_provisions_0307.pdf

3.i.6. Documentation on Privacy Laws:

- 42 U.S.C. §§ 290dd-3, § 290ee-3, and 42 C.F.R. Part 2 ("Confidentiality of Alcohol and Drug Abuse Patient Records");

- 20 U.S.C. § 1232g and 34 C.F.R Part 99 (Family Education Rights and Privacy Act, or "FERPA");

- 42 U.S.C. § 1320d *et seq.,* 45 C.F.R. Parts 160 & 164 (Health Insurance Portability and Accountability Act of 1996, or "HIPAA"); and

The following provisions of the D.C. Code: §§ 4-209.04; 4-754.11; 4-1302.03; 4-1303.06; 4-1405; 7-131(b); 7-1202; 7-1203; 7-1231.14; 7-1305.12; 16-2331(b); 16-2332(b); 16-2333(b); 39-108.

4. OFFEROR ASSUMPTIONS & NEEDS FROM OSSE

In the response to the Request for Proposal, the Offeror must clearly do the following in the proposal:

1. List all assumptions being made in the proposal; and
2. Identify any needs the Offeror has of OSSE to be successful and the meet the needs outlined in this RFP.

In addition, the Offeror must provide the timeline for deliverables in accordance with the proposed project schedule at the time of the contract award.

5. OSSE RESPONSIBILITY

OSSE will maintain responsibility for the following:

1. Manage the contract to ensure the Contractor is meeting the goals, schedules, and deliverables and that District tasks are completed as needed;
2. Provide sufficient working spaced, within the primary facility for the Contractor's working team to install and initiate the operation of the USI solution
3. Provide desks, telephones, computers, and network access as necessary;
4. Perform risk and issues management in collaboration with the Contractor;
5. Hold the Contractor accountable for meeting milestones and deliverables as detailed in the project schedule;
6. Develop and implementing any necessary Change Management plans; and
7. Participate in the User Acceptance Testing (UAT).

6. INTERIM USI SOLUTION

OSSE has an interim USI solution in place. Approximately 100% of the public school student population has already been assigned USIs through the interim solution. Student demographic information is run against the custom matching algorithms. Low confidence, High confidence and No-Match reports are generated. USIs are assigned and loaded into a Sequel (SQL) database. See the process flow below:

The following lists the current data elements being captured:

#	NCES Element ID	Element Name	Element Definition
1	0147	Source ID	A coding scheme that is used for identification and record-keeping purposes by schools, social services, or other agencies to refer to an individual, organization, program, or institution.
2	0146	USI	A unique number or alphanumeric code assigned to a student by state via the SLED.
3	0146	Local ID	A unique number or alphanumeric code assigned to a student by your LEA. This field will be provided with file submission and be provided back to the LEA to help facilitate locating the original record in their local SIS environment.
4	1134	School ID	A unique number or alphanumeric code assigned to school by the School/LEA system.
5	0308	Social Security Number	The nine-digit number of identification assigned to the individual by the Social Security Administration.
6	0156	Last Name	The legal Last Name of the student. The Student Legal Last Name is the name borne in common by members of a person's family, or the last name recognized as the formal and consistent last name given to a person after birth (e.g., birth, baptism, or other naming ceremony certificate; or birth verification document) or through legal action (e.g., marriage, divorce, adoption, or name change).
7	0184	Middle Name	The legal Middle Name of the student. The Student Legal Middle Name is the second name of a person, which is given to a person after birth (e.g., birth, baptism, or other naming ceremony certificate; or birth verification document) or through legal action (e.g., marriage, divorce, adoption, or name change).
8	0131	First Name	The legal First Name of the student. It is the name given to an individual after birth (e.g., birth, baptism, or other naming ceremony certificate; or birth verification document) or through legal action (e.g., marriage, divorce, adoption, or through legal name change).

#	NCES Element ID	Element Name	Element Definition
13	0849	Race	The general racial category, which most clearly reflects the individual's recognition of his or her community or with which the individual most identifies. [Note: The way this data element is listed, it must allow for multiple entries so that each individual can specify all appropriate races. An alternative would be to list the options as separate data elements and have a yes/no option for each one].
14	0851	Sex	A coded value representing the person's gender. Gender is a person's actual sex or perceived sex and includes a person's perceived identity, appearance or behavior, whether or not that identity, appearance, or behavior is different from that traditionally associated with a person's sex at birth.
15	0314	Birth Date	The month, day, and year in which a person was born based on the Gregorian Calendar.
23	0585	English Proficient	An indicator of whether a student is English Proficient or not.
24	0025	Address Type	The type of address listed for an individual or organization.
25	0272	Address	The street number and street name or post office box number of an address.
26	0090	City	The name of the city in which an address is located.
27	0267	State	The Federal Information Processing Standards (FIPS) numeric code for the state.
28	0305	Zip	The five or nine digit zip code portion of an address.
30	0279	Telephone Number	The telephone number including the area code, and extension, if applicable.
31	n/a	Special Ed Status	An indication as to whether an individual has been deemed eligible to receive special education services pursuant to the requirements of IDEA

#	NCES Element ID	Element Name	Element Definition
37	0716	Entry/Grade Level	The grade level or primary instructional level at which a student enters and receives services in a school or an educational institution during a given academic session.
42	0328	Language Spoken at Home	The language spoken by the student at home.

7. UNIQUE STUDENT IDENTIFIER (USI)

A standardized statewide student identifier is needed for every public education student in DC. Offerors shall propose a Commercial-off-the-Shelf (COTS) Unique Student Identifier (USI) solution that will link students across SEDS, including any and all systems that feed into and out of SEDS which covers students with disabilities from birth through secondary transition and age 22. The USI solution shall correctly identify each student and match student level data from multiple systems as LEAs enroll, transfer, and exit students. The proposed USI solution must also maintain and migrate the existing Interim USI solution.

The Offeror shall:

a. Provide a proven and established Commercial-off-the-Shelf (COTS) solution that automatically creates, assigns and maintains USIs for the life of a student educated at some point in the District of Columbia. Because SEDS interfaces with multiple systems and is designed to be integrated with a Statewide Educational Data Warehouse, OSSE is mandated under local law to provide an acceptable USI system that correctly identifies each learner and matches student level data from multiple District systems regardless of the source system in use at OSSE and in the LEAs.

b. Enable a USI interface for commercially available Student Information Systems (SISs). The LEA environment consists of, but is not limited to, the following SIS products: DCSTARS, PowerSchool, Go.Edustar, Blackbaud, and SASI. Additionally, as some Public Charter LEAs do not currently use a commercial SIS, the proposed solution shall also accommodate standard middleware connections to Microsoft office productivity applications such as Excel and Access. The SISs feed into OLAMs whose data feeds directly into SEDS.

c. Develop a system that is not SIS dependent so that regardless of the SIS in use in the LEA environment, the USI functionality is capable of creating unique student identifiers.

The Offeror's USI solution shall contain the requirements listed in the following Table:

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
USI-1	R	Identifier	The USI must be unique (assigned to only one student).	
USI-2	R	Identifier	The USI must remain unchanged (follow the student throughout the school years and between LEAs and Schools if needed).	
USI-3	R	Identifier	The USI must be unduplicated (only one per student).	
USI-4	R	Identifier	The USI must be unidentifiable and shall not include any personal identification information (i.e., the identifier alone will not disclose anything about the student – e.g. not the students Social Security Number or contain any other identifiable data elements such as Date of Birth).	
USI-5	R	Identifier	The USI must not start with 0.	
USI-6	R	Identifier	The USI must be randomly assigned.	
USI-7	R	Identifier	The system must be able to support migration of current USI data for existing DC students.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
USI-8	R	Identifier	The system must support the current DC USI numeric format (10 digits).	
USI-9	R	Identifier	The system must retain a history of all local identifiers for each student associated with each source system.	
USI-10	R	Matching	The matching process must include, at minimum, the following fields: first name, middle name, last name, date of birth, SSN* and gender. *__Note__: See USI-11 for SSN requirement.	
USI-11	R	Matching	The matching process must not require a social security number.	
USI-12	R	Matching	The match process shall allow for additional elements to be added, as required.	
USI-13	R	Matching	The system must allow for specific required data elements to be designated for the matching process.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
USI-14	R	Matching	The system must allow for additional non-matching elements to be uploaded and provided to the user through the web interface for the purpose of comparing students (ex. Address).	
USI-15	R	Matching	The matching process must consist of advanced matching methods and algorithms to produce quick results, consistently including but not limited to phonetic matching (such as soundex and metaphone) and edit-distance (such as Levenstein).	
USI-16	R	Matching	Both the match fields and matching algorithm thresholds must be configurable and tunable through a system administration tool and/or web interface and must not require application code changes.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
USI-17	R	Matching	The matching process must support three-tiered match logic to assist in match resolution, Match, No Match and Possible Match.	
USI-18	R	Matching	The solution must provide a web interface for authorized personnel to resolve and confirm all USIs.	
USI-19	R	Matching	The web interface must provide summary screens with basic details regarding each of the three matching groups: Match, No Match, and Possible Match.	
USI-20	R	Matching	The web interface must provide high-level summary information, including work-flow tasks/counts regarding USI assignment on a splash or dashboard page, for when the user initially logs in.	
USI-21	R	Matching	The web interface must provide detail screens that display submitted information and possible/match record information.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
USI-22	R	Matching	The web interface must provide all possible matches based on defined thresholds to the end user, ideally on one screen.	
USI-23	R	Matching	The web interface must allow an end-user to confirm a match, identify as a new record, and reject a record.	
USI-24	R	Matching	The web interface shall allow an end-user to escalate or ask for help with regards to a record and indicate when a record needs to be resubmitted.	
USI-25	R	Matching	The system must possess a daily process by which the most recent student data is imported or synced from the Data warehouse to ensure the latest student information is used for matching.	
USI-26	R	Data Integration	The system must accept batch loads of data for USIs assignment.	
USI-27	R	Data Integration	The system must support secure file upload through https.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
USI-28	R	Data Integration	The system must track incoming records for repeat submissions based on source system ID and local source system student ID, and only use the latest record for matching.	
USI-29	R	Data Integration	The system must be built on web services architecture, as to allow for later customization of the USI assignment process, as required by DC business processes.	
USI-30	R	Data Integration	The system must support SIF integration for USI data collection and assignment and be SIF compliant with the most current SIF specifications, including two-way communication.	
USI-31	R	Data Integration	The application must create a file of the newly assigned USI IDs to return to the local SIS.	
USI-32	R	Data Integration	The application must provide a web interface to allow users to download the return file.	
USI-33	R	Data Integration	The solution shall support the download of USI information via SIF and web services.	

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USI-34	R	Issue Resolution	The web interface must provide a report of possible duplicate students with multiple USIs and the to fix any data associated with the error.	
USI-35	R	Issue Resolution	The web interface must provide a report of possible erroneously matched students and the tool set to cleanse any data associated with the error.	
USI-36	R	Issue Resolution	The web interface must allow for independent split and merge of USIs to students.	
USI-37	R	Issue Resolution	The web interface must provide historical reports of all split and merged student records.	
USI-38	R	Issue Resolution	The system must not reuse USIs as a result of splitting or merging. The USIs must be deactivated.	
USI-39	R	Issue Resolution	The system must provide a means to communicate splits or merges to the ETL functionality and/or data warehouse, as well as source Student Information Systems.	

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USI-40	R	Issue Resolution	The application must provide a means to merge two records that were assigned to one student. This process shall be managed through the functional screens of the application.	
USI-41	R	Issue Resolution	The system must maintain the data regarding the merged records, as to provide a history of the merging of records. Additionally, the USI that is eliminated through a merge process must not be reused.	

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USI-42	R	Issue Resolution	The system must provide a means to check existing USIs for uniqueness; although validations and confirmation shall eliminate many duplicates, end-users may still create new IDs for existing students. The system shall provide either a standard report to identify any possible duplicates. Additionally, such a report shall allow for possible duplicates to be removed from future reports if they are deemed not to be duplicates.	
USI-43	R	Issue Resolution	The application must allow for flagged items to be resolved by assigned or designated staff.	
USI-44	R	Issue Resolution	The application must provide a means to flag records that users are unable to resolve by themselves and a report of such items.	
USI-45	R	Issue Resolution	The application must allow for flagged items to be resolved by central staff.	

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USI-46	R	Issue Resolution	The application must provide a means to allow central staff to look-up existing USIs and match student records, based on reported/flagged issues.	
USI-47	R	Issue Resolution	The application shall maintain a history of flagged items and resolutions, including auditable information.	
USI-48	R	Issue Resolution	The application must provide a means to flag records that users are unable to resolve by themselves and a report of such items.	
USI-49	R	System Integration	The solution must function as a stand-alone application.	
USI-50	R	System Integration	The solution must provide a means to integrate with other systems, including, but not limited to, source Student Information Systems, ETL functionality, data warehouse, and all other OSSE and District systems identified in this RFP.	

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USI-51	R	System Integration	The solution shall allow for integration with existing security models providing for single sign-on implementations or other methods to access the application based upon LDAP, Active Directory or other security models.	
USI-52	R	System Integration	The solution must support widely used database and application server technologies including, but not limited to, Microsoft SQL Server and Oracle.	
USI-53	R	Validation	The system must provide file, record, and field level validation.	
USI-54	R	Validation	The system must provide a web interface to view any file, field or record level validation results.	
USI-55	R	Validation	The application must provide error reports and error summaries.	

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USI-56	R	Accountability Reporting	The system must provide timeliness reports for accountability and monitoring of the USI business process. This report(s) must display counts of records submitted, records resolved, record unresolved, other status states, and times from submission or status change for all records.	
USI-57u	R	Accountability Reporting	The system must provide timeliness reports specifically for escalated issues (report a problem issues). This report(s) must display number of records escalated, number of escalated records resolved and unresolved, other status states, and times from escalation for any status of escalation. The report(s) shall also display counts by user escalation and links to all escalated issues by an individual user.	

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USI-58	R	Record Audit	The system must collect and maintain audit information for any action or update that occurs in the system. This information must include, at a minimum, user, date and time, and action taken.	
USI-59	R	Record Audit	This audit information shall be displayed throughout the web interface.	
USI-60	R	Record Audit	The application will provide a web interface to view the history of all submitted records, their final determination, and auditable information about the record confirmation/rejection.	
USI-61	R	Email Notifications	The application must provide workflow based email notifications.	
USI-62	R	Email Notifications	Email notifications must be able to be customized (such as recipients, subject, body, etc).	
USI-63	R	User Admin	The USI solution must allow for one user to have access to multiple LEAs and multiple Schools.	

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USI-64	R	User Admin	The USI solution must allow for one user to upload files for multiple LEAs and/or multiple schools.	
USI-65	R	User Admin	The system must allow for different individuals to perform multiple functions to support USI resolution (e.g. Local Administrator uploads a file and Registrar confirms USI matches.)	
USI-66	R	User Admin	The solution must allow for the records of a single source system with many schools to be resolved (matched) by multiple individuals at a specific school.	
USI-67	R	User Admin	The solution must allow for one upload per LEA. The system must not require that individual schools upload separate files.	
USI-68	R	User Admin	The system must provide a web interface to add, edit and deactivate users.	
USI-69	R	User Admin	The application must provide a web interface to edit existing users (including disabling or re-enabling the user).	

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USI-70	R	User Admin	Users must not be deleted from the system even after all role assignments have terminated.	
USI-71	R	User Admin	The application must provide a means of centralized management of user roles.	
USI-72	R	User Admin	The application must provide a means of decentralized management of user roles with restricted role assignment capability for pre-assigned organizational level values and individuals.	
USI-73	R	User Admin	The application will provide a web interface that allows appropriately authorized users to grant other users access to specific roles.	
USI-74	R	User Admin	The application must allow all users to be assigned an organization(s), which may include, SEA, IEA, LEA, NPS and Schools within an LEA or NPS.	

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USI-75	R	User Admin	The application must provide reports on active users and their assigned roles at various organizational levels to allow security administrators to review role assignments.	
USI-76	R	User Admin	The application must record auditable information on granting user role assignments, including the date the assignment was made, who authorized the assignment, and other relevant data related to the assignment.	
USI-77	R	User Admin	The application must keep a history of user role assignments.	
USI-78	R	User Admin	The application must provide a web interface to view role assignment history.	
USI-79	R	User Admin	Role assignments must be able to be created with a termination date.	
USI-80	R	User Admin	The system must restrict access to the application when a role termination date has passed.	

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USI-81	R	User Admin	The application must provide a report on upcoming role termination dates.	
USI-82	R	User Admin	The application must provide notification to users prior to their role termination date far enough in advance that the user can reasonably take action to renew the role (e.g., email notification).	
USI-83	R	Training	The Offeror must provide training to OSSE staff in a Train-the-Trainer model, as well as all training for system administrators.	
USI-84	R	Training	The Offeror must provide training options in the proposal.	
USI-84	R	Training	The Offeror must provide related documentation to support the application and training exercises.	
USI-85	R	Support	The Offeror must provide application level support on an on-going basis.	

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USI-86	R	Support	The Offeror must provide standard software and system updates, as needed, to include release documentation such as release notes, scripts, queries, updated documentation and other release documentation.	

8. ENVISIONED ARCHITECTURE

Below is the envisioned architecture for the USI Solution:

9. DATA MIGRATION

OSSE developed an interim USI solution to assign USIs. This interim USI solution captures student demographic data and assigns USIs. The Offeror will be responsible for migrating the data from the Interim USI solution to the proposed USI Solution.

As part of the Offeror response, the Offeror must identify, define and show examples of the methodology and tools it proposes to use to fulfill all data migration requirements. The Offeror must include a data migration plan (including source to target data mappings, business rules and migration methodology), a list of tools required in the migration process and a process for user acceptance of the migration results. The Offeror shall:

1. Specify all security measures to be employed;
2. Indicate approach to maintaining data integrity and quality assurance during the conversion effort and the documentation that will confirm that data integrity is maintained;
3. Describe measures to ensure adequate access to live data during the conversion effort; and
4. Identify additional software use and include cost in proposal.

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DM-1	R	USI	The USI solution must be able to import existing USIs into the solution.	
DM-2	R	USI	The USI solution must be able to use existing matching data elements associated with existing USIs.	

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DM-3	R	USI	The USI solution must be able to load existing data needed to create USIs from the interim USI solution, such as student demographic data and existing USIs.	
DM-4	R	USI	The conversion of data for the USI solution must consider all related data elements, however, not all elements may be required to convert, especially considering audit and accountability data.	
DM-5	R	USI	USIs that are migrated shall continue to be used in the new USI solution and they shall not be duplicated.	
DM-6	R	General	The data conversion must not require that the existing data warehouse experience downtime, other than for the purpose of cutover to the new USI solution.	

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DM-7	R	General	The data conversion process must maintain 100% data integrity from the existing data set to the new solution.	

10. PORTAL

The District of Columbia Government has established web interface standards cross its information technology resources. Any application that will be accessible to the public must adhere to these standards. To that end, as the information collected by and reported on through the USI solution will be made available to external DC Government users, the developed solution must be able to meet these standards for all users.

Additionally, and as previously mentioned, the proposed system must be able to integrate with existing information technology resources utilized by the District (see Envisioned Architecture diagram). This integration with other available resources will allow the District to leverage the technology in place, adopt new systems in a centralized manner, and minimize the burden on the District to the USI solution from a technical perspective. For example, OSSE expects the solution to produce canned reports. The proposal should include a list of these reports and appropriate screen shots.

Keeping these factors in mind, the selected proposal must meet the following requirements. Note that the District holds an enterprise license for Sharepoint 2010. As such, the Offeror will have access to this software to implement the requirements in this section if the Offeror chooses.

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P-1	R	General	The portal must support web services integration.	
P-2	R	General	The portal must provide all features and functions in Internet Explorer, Firefox, and Safari, at a minimum. Other web browser compatibility is desired.	
P-3	D	Look-and-Feel Standards	The portal must adhere to the Resource Center Level standards, as outlined in the *DC Portal Resource Center Standards Guide.* An example site is the Education Resource Center located at http://educationcenter.dc.gov/	
P-4	R	Look-and-Feel Standards	The portal must allow for both public and secure views of the data to adhere to the common web interface standards of the DC Government.	
P-5	R	Look-and-Feel Standards	The portal must follow the Cascading Style Sheet established by the DC.Gov Standards document.	

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P-6	R	Look-and-Feel Standards	The solution must utilize common drop-down selectors, radio buttons, and check boxes across all system features.	
P-7	R	Look-and-Feel Standards	The solution must allow for at least two-tiered navigation.	
P-8	R	Look-and-Feel Standards	All reporting tables must adhere to the DC.Gov Standards.	
P-9	R	Look-and-Feel Standards	The solution must allow for table sorting and filtering within tables of data.	
P-10	R	Look-and-Feel Standards	The solution must not contain any branding, logos or icons of any Offeror, private company or specific product. Only District of Columbia branding is allowed.	
P-11	R	Data Exports	Allow users to export and print data to a PDF, Excel and CSV formats as applicable.	
P-12	R	Data Exports	Provide the ability to print all reports in a printer-friendly format.	

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P-13	R	Look-and-Feel Administration	The portal must provide administration tools that allow for any newly developed standards to be implemented including, but not limited to header, footer, navigation, and Cascading Style Sheets.	
P-14	R	Look-and-Feel Administration	The portal must provide administration tools that allow OSSE users to add, update, or remove content displayed to users both public and private.	
P-15	R	Look-and-Feel Administration	Within the administration of the portal content, the tool must provide a means to version reports and pages of content, as well as draft, approve and publish content.	
P-16	R	Look-and-Feel Administration	The portal solution must provide user administration tools to manage users within the portal.	

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P-17	R	Access Levels	The portal must allow for a single point of entry for both public and secure sections of the system, using a single base URL for both access types.	
P-18	R	Access Levels	The portal solution must allow for both public and secure facing views of pages and functionality.	
P-19	R	Access Levels	The portal must allow for reports to be reused across public and secure pages, reports and functionality.	
P-20	R	Dashboards and Widgets	The portal must provide a dashboard screen to all users.	
P-21	R	Dashboards and Widgets	The portal must allow for widgets of data to be displayed on dashboard screens.	
P-22	R	Dashboards and Widgets	The application must allow a central administrator to publish data to users' dashboards.	

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P-23	D	Dashboards and Widgets	The application must allow for a user to customize their dashboard, which should include the placement of widgets, the format of the widget (data, pie chart, bar graph, etc), and the content available on the dashboard.	
P-24	R	Dashboards and Widgets	The application must provide a means for a central user to "lock" content on dashboards, as so that an end user cannot remove the information.	
P-25	R	Dashboards and Widgets	The application must store all user preferences for their dashboard and retain the settings across log-ins.	
P-26	R	Canned Reports	Provide canned reports to meet the District requirements during the requirements gathering phase.	

11. USI ASSIGNMENT PROCESS

All proposals should clearly outline the USI assignment process and address the following:

1. Data elements used in the matching process;

2. Data quality and validation checks provided with the system;
3. Error resolution process;
4. Near Match resolution process;
5. USI Assignment process;
6. Types of matching results that can be provided;
7. Screen Shots of each step in the matching process and USI assignment;
8. Identify and describe how tuning is done in the system; and
9. Describe the various options for providing USIs to LEAs.

12. PROJECT MANAGEMENT

The Offeror is responsible for ensuring that all activities, objectives, and the deliverables described in the Offeror's project plan and responses to this RFP are achieved within budget and on schedule. The Offeror must have a time-tested and well-engineered project management methodology that clearly demonstrates to the District that the Offeror can manage the project and meet its obligations. The project management section must be specific and complete.

As part of the Offeror's response, the Offeror must describe the project management methodology that will be applied to this effort. The Offeror must address how the Offeror's management team will lead and control the execution of this contract within the project management section of the proposal. The project management section must include, but not be limited to, project management methodology, a clear list of documents and other deliverables that will be provided to support the methodology, project organization and oversight, teaming/subcontracting management, key personnel, staffing management, and quality assurance management. On-site project management is required and the extent of this will be determined during the contract negotiation phase.

In addition, the Offeror is responsible for addressing the following topics, at minimum:

1. Project Plan

a. Organizational and project management structure and functions;
b. Project document management;
c. Pre-project planning and design;
d. Acceptance management;
e. Budget and cost management;
f. Change control process and management;
g. Risk and issues management;
h. Task management;
i. Milestone delivery management; and
j. Weekly status meetings to address the following at a minimum:
    i. Project Status to meet deliverables, timeline, action items; and
    ii. Risk/Issue identification, management and tracking.

i. Project Management & Implementation Methodology

The Offeror's response must address the requirements in the table below:

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror shall provide the following in the proposal response:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
PM-1	R	Project Methodology	Detailed project management methodology that will be used to manage the project.	
PM-2	R	Organization Structure	Project organization structure.	
PM-3	R	Communication	Description of strategy and approach for ensuring proper communication to the District.	
PM-4	R	Implementation Plan	The process used for the creation of the Architectural Blueprint for project scope and business, technical and functional requirements.	
PM-5	R	Implementation Plan	The requirements development process to include tools, techniques and methods for eliciting, analyzing, documenting, communicating, validating & approving requirements and managing requirement changes.	
PM-6	R	Implementation Plan	A project management schedule that reflects the process described above in conjunction with the project management methodology.	

ii. Project Deliverables

The response to the RFP must contain the following deliverables at a minimum: Project Schedule, Change Control Plan, Test Plan/Methodology, User Acceptance Testing Plan and Training Plan. If relevant, the Offeror must provide additional documents as part of its project management plan in this section.

Upon the start of the project OSSE will work with the Offeror to finalize the set of deliverables to create the official Project Management Plan. The Offeror is expected to continuously monitor the status of the deliverables throughout the project and include the status in the weekly status reports or as requested by the District. All deliverables shall be subject to an agreed upon acceptance and change control process and are subject to approval by OSSE.

OSSE will conduct a formal User Acceptance Testing (UAT) prior to formal acceptance of the solution to ensure that all requirements are met.

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	Deliverable	Deliverable Description	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
PMD-1	R	Project Schedule	As part of the proposal the Offeror should provide a detailed project schedule outlining Work Breakdown Structure, tasks, duration, start dates, end dates, predecessors, resource names/titles.	
PMD-2	R	Training Plan	Provide a training plan. The Offeror proposal shall describe the most appropriate way to provide training to key District staff, stakeholders and users. The training plan shall include at a minimum, the strategy and methods for carrying out in-person training for up to 25 people , how training will be delivered, who will be responsible for overseeing and coordinating the training effort, equipment required, and the logistics involved in setting up the system in preparation for training.	
PMD-3	R	Change Control Plan	The Offeror shall provide as part of its response how it will manage and track changes outside of the projects scope by delivering a Change Control Plan.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	Deliverable	Deliverable Description	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
PMD-4	R	Test Plan	Provide a test plan that includes the following at a minimum: system testing, functional/technical requirements testing, performance testing, user interface, and user acceptance testing by OSSE.	
PMD-5	R	Issue Report	Provide an Issue Report for issues relating to any aspect of the project (from requirements through implementation) as well as any other items that impact the project. The issues report must include: a. Description of the issue; b. Resource assigned to resolve the issue; c. Categorization of the issue (such as technical, procurement, resources, training or communications, etc.); d. Analysis of the causes of the problem; e. Proposed solution; f. Cost impact; and g. Assessment of its impact on the schedule and completed work products and services. This report must be provided on a weekly and as needed basis.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	Deliverable	Deliverable Description	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
PMD-6	R	Risk Management Report	Provide a risk identification report for risks relating to any component of the project (from requirements through implementation) as well as any other items that impact the project. For definition purposes, a risk is a potential problem; an issue is a current problem. The risk section of the report must include: a. Description of the risk; b. Categorization of the risk (such as technical, procurement, training or communications); c. Analysis of the causes of the risk; and d. Several mitigation approaches and associated consequences. This report must be provided on a weekly and as needed basis.	
PMD-7	R	Scope Document	Provide scope document at the project onset to be approved by OSSE that clearly and fully describes the projects scope and deliverables at the onset of the project.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	Deliverable	Deliverable Description	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
PMD-8	R	Status Reports	The Offeror must provide status reports on a weekly or as needed basis to the District to be jointly reviewed in weekly status meetings. These status meetings will review progress toward milestones and deliverables as defined in the baseline project plan and associated project schedule. In addition, these meetings will address any changes to the baseline project with an assessment of the impacts of such changes and recommendations for mitigating the effects of such changes. The status reports shall include, but not be limited to risks, issues, milestones, project schedule updates and current project activities. The weekly status reports must be aligned with the Project Plan and project schedule that was approved by the District.	
PMD-9	R	Test Cases	Provide detailed scenarios that must be tested along with their priority, pass/fail criteria, input/output specifications, and actual pass/fail results.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	Deliverable	Deliverable Description	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
PMD-9	R	Work Breakdown Structure (WBS) Project Schedule	Develop a WBS Project Schedule to include all Offeror and District tasks. The WBS Project Schedule shall include a hierarchical breakdown of the solution components and activities. The WBS will be developed until there is an agreed upon level of accuracy and completeness for project tasks, resources loaded and leveled and dependencies established. The WBS project schedule must be updated with the current state of work that is completed and in progress. The Offeror's Project Manager shall continually update the project plan throughout the project and provide updated versions of the project plan to the District during the weekly status meetings and/or as requested by the District.	
PMD-10	R	Requirements Document	Conduct requirements gathering and develop a requirements gathering document that will be signed off by OSSE. The requirements document will serve as the foundation for development and testing by the Offeror.	

iii. Quality Assurance (QA) Plan

The Offeror shall demonstrate in its response to this RFP the quality assurance and control mechanisms that will be used to make this project successful. The Offeror shall provide a plan that defines the overall objectives, strategy, and process for ensuring the project achieves its goals and objectives, and at the agreed to levels of completeness, accuracy and performance.

The Offeror shall provide a completed Quality Assurance Plan to address quality. The Offeror may provide additional QA methods and shall provide evaluation items applicable to its approach identifying clear objectives, performance standards, acceptable quality levels, and methods.

The Offeror shall address quality assurance management by describing the Offeror's quality methodology and how quality assurance activities will be aligned with the Offeror's deliverables and how these activities will be managed and conducted. Additionally, the Offeror shall address the process for coordinating and communicating quality matters with the District.

In alignment with quality assurance, the Offeror shall:

a. Conduct internal system tests of each component of the solution to evaluate the solution's performance and compliance with the requirements;
b. Document the results of the internal system test and make recommendations to changes to the components of the solution, configuration or business processes to the District;
c. Modify software and/or processes as needed to accommodate the internal system test results;
d. Conduct tests of each product with a representative sample of District users via User Acceptance Tests;
e. Collect feedback and analyze the product's performance with regard to accuracy, speed, and volume;
f. Document and share the results with the OSSE;
g. Modify software as needed to resolve deficiencies and make improvements discovered during various testing phases (Unit Test, System Test, UAT, etc.); and
h. Modify the system and user documentation as needed.

iv. Test Plan and Procedures

The Offeror must provide a comprehensive Test Plan to ensure that all components developed for or integrated into the solution meet the requirements that will be finalized during the requirement phase of the project. At a minimum, the overall Test Plan and testing procedures must include the following:

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
T-1	R	Test Manager	Provide a test manager who will be responsible for ensuring the requirements are fulfilled to the District's satisfaction.	
T-2	R	Test Methodology-Proposal	Describe in the proposal the overall guidelines, procedures and methodology used to conduct testing and ensure its quality.	
T-3	R	Unit Testing	Conduct Unit Testing, which ensures that each developed component has been built per specifications and focuses on removing any defects prior to system testing.	
T-4	R	Unit Testing	Allow for a code review by OSSE for best practices.	
T-5	R	System Testing	Conduct system testing by testing the system as a whole against the system test specifications to ensure all components work together properly and that all interfaces with other systems are functioning.	
T-6	R	Stress/Load Testing	Perform stress/load testing by conducting performance tests on the system by identifying peak usage within units of work and stressing system components to peak capacity.	
T-7	R	Security Testing	Test the system to ensure that all defined role-based user profiles have access to data and processes and perform functionality as per specifications.	
T-8	R	Security Testing	Ensure that security requirements outlined within FERPA are followed.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
T-9	R	Testing Tools	Use District Government provided testing tools: Mercury Quality Center, Mercury Quick Test Pro and HP LoadRunner.	
T-10	R	Testing Tools	Enter the test plans, test scripts (manual and automated), test scenarios and log all defects in Mercury's Quality Center.	
T-11	R	Testing Tools	Provide testers that are proficient with Mercury's Quality Center suite and HP LoadRunner.	
T-12	R	Testing Process	Ensure OSSE sign off on the test plan, test data, test cases and test scenarios.	
T-13	R	Defect Tracking	Ensure that all components developed within the scope of this project do not have excessive design and coding errors and omissions.	
T-14	R	Defect Tracking	Ensure that all business requirements are operational without defects prior to moving to production.	
T-15	R	Proposal	Incorporate in the proposal the total number of concurrent users the system being provided will support.	
T-16	R	User Acceptance Testing (UAT)	Incorporate a formal UAT process, to be approved by OSSE, which will allow users to test the system prior to any production release.	
T-17	R	User Acceptance Testing (UAT)	Ensure that UAT is performed by the District prior to acceptance or implementation of the solution.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
T-18	R	User Acceptance Testing (UAT) Plan	In the proposal the Offeror must describe the UAT plan and approach that will be used for end user acceptance testing and user signoff in the proposal. Include in your description suggested methods for soliciting on-going feedback from stakeholder groups throughout all phases of the project.	
T-19	R	User Acceptance Testing (UAT)	The UAT Plan must be approved by OSSE.	
T-20	R	Test Tracking	Allow logging of test cases, testing results, issues, and their resolutions to be provided on a regular basis to OSSE.	
T-21	R	Test Data	Be responsible for generating any needed test data to the OSSE.	
T-22	R	Test Data	Be responsible for writing unit test specifications, system test specifications, test case scenarios, and any required test scripts for performing stress/load testing or other testing.	
T-23	R	Test Cases	Provide test case descriptions to include the expected results of each test.	
T-24	R	Test Cases	Provide actual test results for all test activities throughout the testing phases.	
T-25	R	Test Cases	Document detailed test cases traced to all requirements included in this Request for Proposal and any subsequent requirements agreed upon by the Offeror and the District.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
T-26	R	Test Plan	Submit test plans that include details that describe the approach for the initial test period, pilot test period, and the final acceptance test.	
T-27	R	Testing Plan	Acquire signoff from OSSE on the test plan and test procedures prior to conducting testing.	

13. SYSTEM SECURITY & SECURITY PLAN

The Offeror shall submit a security plan that describes existing and planned controls that will be implemented to ensure the confidentiality, integrity, and availability of information and systems supporting the project task. The Security Plan shall provide an overview of the security requirements for all components in the proposal and describe the existing or planned controls (management, operational, and technical) for meeting those requirements. The plan shall describe the relevant systems, identify risks, and delineate responsibilities and expected behavior of individuals who access the systems.

The Offeror shall ensure that the information in the USI Solution is protected against unauthorized disclosure, transfer, modification, or destruction, whether accidental or intentional. The COTR reserves the right to have a third-party conduct a security audit of the USI Solution to determine compliance with current District security standards and industry-recognized best practices. The Offeror shall ensure that the security components include the following listed in the Table below:

Requirement #	DESIGNATION R = REQUIRED OR D = DESIRABLE	Category	Requirement The Offeror shall provide a solution that provides:	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
S-1	R	Audit	Auditing and transaction logging facilities	
S-2	R	Authentication	Strong authentication throughout all components.	
S-3	R	Authentication	System wide user security and authentication through open standards such as LDAP and/or Active Directory.	
S-4	R	Authentication	Single sign-on for all integrated components.	
S-5	R	Authentication	Ability to set a timeout and terminate session limit by type of user.	
S-6	R	Users	A role based security model.	
S-7	R	Compliance	Compliance with OCTO policies, guidelines, and procedures documented at: http://octo.dc.gov/octo/cwp/view,a,1302,q,579820,octoNav,%7C32782%7C.asp	
S-8	R	Compliance	Compliance with state and federal law statutes (especially FERPA and HIPPA) that protect the confidentiality of student, staff and user information	
S-9	R	Connection Monitoring	Connection monitoring	
S-10	R	Data	Data integrity checks. In addition,	

Requirement #	DESIGNATION R = REQUIRED OR D = DESIRABLE	Category	Requirement The Offeror shall provide a solution that provides:	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
			the Offeror should provide the types of data integrity checks in the proposal.	
S-11	R	Data	Data element level protection in all tiers: integration, database, reporting	
S-12	R	Encryption	Encrypted connections (specify level of encryption)	
S-13	R	Field Level	Field level encryption	
S-14	R	Role-Base	Role-based security at the data element level for users	

14. SYSTEM ADMINISTRATION

The Offeror shall provide a USI Solution that has system administrator's access for District personnel:

1. To enter and change security access and rights for any and all system users.

2. To conform to LDAP user

3. To add, update and delete code tables and table entries, reports and other system tables in a quick and efficient manner using on-line tools.

15. OPERATIONS/CAPACITY

The Offeror shall provide a system that has the capacity and scalability to perform the requirements listed in the following Table:

Requirement #	DESIGNATION R = REQUIRED OR D = DESIRABLE	Category	Requirement The Offeror shall provide a solution that:	OFFEROR RESPONSE 1 = CAN MEET VIA STANDARD SYSTEM FUNCTIONALITY (SSF) 2 = CAN MEET VIA SSF WITH LIMITED CONFIGURATION CHANGES 3 = CAN MEET VIA SSF WITH EXTENSIVE CONFIGURATION CHANGES 4 = CAN MEET WITH CUSTOM DEVELOPMENT & CODE CHANGES (NOT STANDARD FUNCTIONALITY) 5 = CANNOT MEET
OC-1	R	Peak Loads	Handles peak loads at reporting times (submission of fall enrollment, release of report cards or District test results)	
OC-2	R	Performance	Meets periods of excessive demand on short notice	
OC-3	R	Response Time	Provides an average response time of two seconds or less for users with adequate network connectivity, displaying a "Please Wait" or similar message when complex calculations require more processing time.	
OC-4	R	Reliability	Has a proven reliability rate greater than 99%.	
OC-5	R	Availability	Supports 24x7x52 accessibility to reports/data by Internet end-users	
OC-6	R	Data Loss	Handles power, server, and Internet interruptions without loss of system and data integrity.	

OC-7	R	Data Storage	Stores a minimum of 21 years of student data and facilities information for each record.	
OC-8	R	Data Storage	Supports storage needs of approximately 75,000 students per year in DC. A growth factor of 3% per year shall be used to project capacity.	

16. ENTERPRISE ARCHITECTURE

The USI solution will be hosted in the District's data center and it must conform to the hardware, software, operating system and database requirements listed below. In addition, upgrade information is also provided for maintenance purposes. The District will provide limited implementation assistance, appropriate technical information, and scheduling assistance, as required to meet the project's timeline.

The Offeror's proposal should provide a detailed architecture diagram that meets the requirements below:

i. Hardware Requirements

The following are the hardware requirements for the District data center:

a. Standard Dell hardware only;
b. End of Life (EOL) equipment – hardware with no current maintenance or warranty will not be allowed to be operational in the Data Center;
c. The application should be able to be in a VMware environment. If the Offeror's solution cannot be in a VMware environment then a detailed justification should be provided in the response;
d. Any other hardware platform is unlikely to be permitted; and
e. Database servers with either SQL cluster or Oracle Grid on the UCP.

ii. Software Requirements

The following are software requirements for the District data center must be met:

a. .NET only; and
b. ColdFusion will not be supported.

iii. Operating Systems

Only the following operating systems are supported in the District data center:

a. Windows Server 2008; and
b. Linux – Enterprise Redhat/Oracle Linux.

iv. Databases

The following are the databases that are supported in the District data centers:

a. SQL 2005/2008; and
b. Oracle 10g and 11g.

The database server application should be able to leverage a database cluster/Grid. The District does not support DB2, Sybase or Informix.

v. High Availability and Failover

The District wants high availability for the USI solution that has failover capabilities amongst its data centers. The USI solutions should be able to leverage failover capabilities of a GTM/LTM F5 load balancer between data centers. The architecture should be able to support Active/Passive availability, at a minimum.

vi. Upgrades

The following upgrade information is provided:

a. Operating System upgrades need to be initiated by the Offeror by informing the District. Upon project initiation this process can be finalized;
b. The District schedules patching of the operating systems on all servers to occur once a month; and
c. The patches for application servers have to be tested and verified by the District prior to installation on the production system.

17. TRANSITION, SUPPORT & TRAINING SERVICES

The Offeror shall ensure that OSSE has the ability to maintain the system upon completion of the project. The Offeror's proposal shall provide examples of documentation and level of detail that will be provided to OSSE to maintain the hardware and software for upgrades and future system enhancements. The Offeror shall describe in detail how the Offeror will support OSSE after project completion to manage upgrades, patches, enhancements and issues.

OSSE staff must be productively utilized throughout for knowledge transfer to ensure OSSE is prepared to support and properly maintain the system upon project completion. OSSE will plan, manage and execute all change management and training initiatives for the user community. As a result, the Offeror should include training to OSSE that will allow OSSE to be self-sufficient upon project completion. OSSE has a help desk that will serve as a Tier 1 support to assist users. OSSE will also provide Tier 2 and Tier 3 level support. However, the District expects the Offeror to provide Tier 4 support, as needed. The Offeror's response shall discuss in detail how the Offeror will do the following:

a. Train and support District trainers;
b. Train and provide all necessary technical documentation to OSSEs technical staff;
c. Expedite knowledge transfer to District resources;

d. Provide support to OSSEs Tier 3 support team;
e. Demonstrate how the requirements of this section will be achieved;
f. Provide examples of documentation that will be used and any additional methods and techniques to ensure OSSE staff are properly trained to support and maintain the system; and
g. Describe in detail how the Offeror will manage patches, upgrades and enhancements after the completion of the project.

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
TST-1	R	Training	Provide mentoring specifically for the staff that will have operational and maintenance responsibility for the system.	
TST-2	R	Documentation	Deliver all documents in Microsoft Word or another commercial off-the-shelf application that has been approved by the District.	
TST-3	R	Documentation	Provide a Technical User Manual that is a description of system functions, application procedures, error troubleshooting guides including contingencies and/or alternative modes of operations (backup plan).	
TST-4	R	Documentation	Provide a System Maintenance Manual that is a description of system maintenance procedures, critical internal/external interfaces, regression testing guidelines, review of cross platform prescribed hardware/ software and network architecture, and key application and operational technical support contact list.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
TST-5	R	Documentation	Provide a System Operation Manual that is a description of system administration procedures, program executables, prescribed hardware/software requirements, installation procedures, backup and recovery procedures, archival and restoration procedures, and contingency procedures.	
TST-6	R	Documentation	Provide a System Standards Manual that is a description of the standards used to develop the application such as coding methodology, data dictionary, naming conventions and other similar items.	
TST-7	R	Documentation	Provide other documentation that the Offeror deems to be necessary to assist with knowledge transfer and operational support.	
TST-8	R	Documentation	Develop and maintain all systems documentation listed in TST-3 to TST-7 so that it is up to date and accurate.	
TST-9	R	Documentation	Update all operational documentation at conclusion of each release to include upgrades and patches.	
TST-10	R	Documentation	Provide appropriate documentation for all Train-the-Trainer classes.	
TST-11	R	Documentation	Allow OSSE to modify all documentation as needed to support OSSE's training efforts.	

REQUIREMENT NUMBER	DESIGNATION R = REQUIRED OR D = DESIRABLE	CATEGORY	REQUIREMENT The Offeror Shall:	OFFEROR RESPONSE 1 = WILL MEET COMPLETELY 2 = CANNOT MEET
TST-12	R	Documentation	Write the documentation in a format that is easily comprehended by the intended audiences.	
TST-13	R	Documentation	Agree that all documents must be reviewed and approved by OSSE.	
TST-14	R	Operational Support	Report on the progress of resolving the technical issues when they arise.	
TST-15	R	Operational Support	Make changes to the component(s) as required, if bugs, defects, or substantial deficiencies are discovered.	
TST-16	R	Operational Support	Support District technical resources who will act as the point of contact for end users to resolve system/server level performance or access issues.	
TST-17	R	Training	Provide Train-the-Trainer classes to enable OSSE to train all users on how to use the system.	
TST-18	R	Training	Provide Train-the-Trainer classes to enable the District to maintain the system.	
TST-19	R	Operational Support	Provide Tier 3 support to support the OSSE Help Desk when needed.	
TST-20	R	Operational Support	Update support documentation with resolutions to issues that were not previously in the documents.	

18. KEY PERSONNEL

The Offeror must identify persons it considers Key Personnel for the project. The Key Personnel specified are considered to be essential to the work being performed hereunder. Prior to diverting any of the specified Key Personnel for any reason, the Offeror shall notify the Contracting Officer at least thirty calendar days in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact upon the contract. The Offeror shall not reassign the Key Personnel or appoint replacements without written permission from the Contracting Officer.

The Offeror shall provide written notification of the removal of the any Key Personnel as specified in advance of the scheduled removals and within 24 hours for unscheduled removals. The written justification shall provide explanations and justification of the removal of any Key Personnel as well as the Offeror's plan to temporarily and permanently fill those positions. The Offeror shall not replace the Key Personnel without written permission from the Contracting Officer.

The Offeror shall provide the names and reporting relationships of the key personnel the Offeror shall use to perform the work under the proposal. Their resumes shall be included. The hours that each shall devote to the contract shall be provided in total and broken down by task.

19. OFFEROR RESPONSE FORMAT - DOCUMENT DELIVERABLES

The Offeror must submit the response to the RFP in the outline provided below. If the format is not followed the District reserves the right to not review the proposal. The Offeror must complete the tables identified in previous sections that include a "Offeror Response" column. Under each category below, the Offeror should address the identified section from the RFP accordingly.

a. **Introduction**
b. **Team Arrangement**
c. Provide information on prime and all subcontractors.
d. **Assumptions and Needs from OSSE**
    i. Offeror Assumptions and Needs from OSSE
e. **Project Management**
    i. Project Management
    ii. Quality Assurance
    iii. Test Plan and Procedure
b. **General**
    i. User Community
c. **Implementation**
    i. Unique Student Identifier (USI)
    ii. Data Migration
    iii. End-User Emails/Communication Tool
    iv. Teacher and Staff Module
    v. Electronic Transcripts
    vi. Operations/Capacity

d. **Data Transfer/Integration**
    i. Data Transfer/Integration
e. **Portal**
    i. Portal
f. **Decision Support Software**
    i. Decision Support Software
g. **Architecture**
    i. Enterprise Architecture
    ii. Provide hardware and software details
h. **Security**
    i. System Security and Security Plan
i. **System Administration**
    i. System Administration
j. **Transition/Operational Support**
    i. Transition, Support & Training Services
k. **Additional Topics**
    i. Offerors should use this section to add any items they feel are relevant outside of the above sections that could enhance the proposal response.
l. **Resumes**
    i. Provide resumes of all key personnel and subject matter experts that will work on the project.

20. PROPOSAL SUBMISSION

Proposals must be submitted not later than August 26, 2010 by 2:00 p.m. Proposals may be withdrawn or modified upon written or telegraphic notice if received before the closing date and time for receipt of proposals. A late modification of a successful proposal, which makes its terms more favorable to the District, may be considered at any time it is received.

Only complete proposals will be considered. The offer must also be signed by a agent of the organization with sufficient authority to bind the organization. OSSE will not accept proposals for only a portion of the required solution or proposals or portions thereof where services are performed offshore. While not required, the use of District of Columbia Certified Business Enterprise companies is strongly encouraged where appropriate.

If an Offeror has any questions relating to this solicitation, they may submit the question in writing Janet Spevak at Janet.Spevak2@dc.gov. The Offeror shall submit questions no later than 10 days prior to the closing date and time indicated for this solicitation. The District will furnish responses promptly to all Offerors.

Offerors that include in their proposal data that they do not want disclosed to the public or used by the District except for use in the procurement process shall mark the title page with the following:

> "This proposal includes data that shall not be disclosed outside the District and shall not be duplicated, used or disclosed in whole or part for any purposed except for use in the procurement process.

If, however, a contract is awarded to the Offeror as a result of or in connection with the submission of this data, the District will have the right to duplicate, use, or disclose the data to the extent consistent with the District's needs in the procurement process. This restriction does not limit the District's rights to use, without restriction, information contained in this proposal if it is obtained from another source. The data subject to this restriction are contained in sheets [Offeror shall insert page numbers or other identification of data]. "

The Offeror's response to this solicitation shall be the property of the District of Columbia and will not be returned to the Offeror.

21. SCORING AND EVALUATION

The requirements of the final contract award must include a written response to this Request for Proposal. Proposals will be evaluated by a panel of reviewers. The two-step evaluation process is described below:

1. **Technical Proposal Evaluation-** Each proposal will be reviewed to ensure that each Offeror has met the minimum eligibility criteria for consideration as outlined in Section 21.
2. **Demonstrations-** Offerors that meet the competitive range will be asked to provide a demonstration of their product within a ten (10) day notice. The demonstration will consist of a maximum of a four (4) hour period in which the Offeror will be given one (1) hour for an overview, one (1) hour for a demonstration of the proposed solution, two (2) hours for detailed discussions related to the proposal and demonstration. The Offeror will be provided a script to follow, load District provided data into the proposed solution and perform various tasks with the provided data. As a note, the District reserves the right to change the format of the demonstrations and Offerors will be notified accordingly.

The table below illustrates the respective weights of each evaluation factor.

Item	Evaluation Factor	Evaluation Percentage Points
1	Technical Proposal	50%
2	Demonstrations	20%
3	Cost Proposal	30%

22. CONTRACT AWARD

The District intends to award the contract resulting from this solicitation to the responsible Offeror whose offer conforming to the solicitation will be the most advantageous to the District.

Any contract awarded will be concluded through competitive negotiations. The District reserves the right to withdraw this request for proposals at any time.

23. ADDITIONAL TERMS AND CONDITIONS

i. Term of Contract

The term of the contract shall be for a base period of twelve (12) months, from the date of award specified on the cover page of the contract.

ii. Inspection and Acceptance

The inspection and acceptance requirements for deliverables identified in the Offeror's response shall be governed by the clause number six (6) , Inspection of Services, of the Government of the District of Columbia's Standard Contract Provisions for use with Supplies and Services Contracts, dated March, 2007.

iii. Invoice Submittals and Payments

The District will make payments to the Contractor for deliverables upon the submission of proper invoices, at the prices stipulated in the contract for services performed and accepted, less any discounts, allowances or adjustments provided for in the resultant contract.

The District will pay the Contractor on or before the 30th day after receiving a proper invoice from the Contractor.

All invoices shall be submitted for certification to the Contracting Officer's Technical Representative.

iv. Method of Payment

Each deliverable will be evaluated for completeness and, if necessary, successful user acceptance testing. Payment will be made on completion and acceptance by COTR of each deliverable identified in the Offeror's response to this solicitation.

v. Contracting Officer

Contracts may be entered in to and signed on behalf of the District Government only by contracting officers. The address and telephone number of the Contracting Officer is:

Carole Lee, Contracting Officer
Office of the Chief Operating Officer
810 – 1st Street, NE, 9TH Floor
Washington, DC 20002
(Office No.) 202-727-7187
(Fax No.) 202-727-2019

The Contracting Officer is the only person authorized to approve changes in any of the requirements of the contract. The Contractor shall not comply with any order, directive, or request that changes or modifies the requirements of the contract, unless issued in writing and signed by the Contracting Officer. In the event the Contractor effects any change at the instruction or request of any person other than the contracting officer, the change shall be considered to have been made without authority and no adjustment will be made in the contract price to cover any cost increase incurred as a result thereof.

vi. Contracting Officer's Technical Representative (COTR)

The COTR is responsible for general administration of the contract and advising the Contracting Officer as to the Contractor's compliance or noncompliance with the contract. In addition, the COTR is responsible for the day-to-day monitoring and supervision of the contract, of ensuring that the work conforms to the requirements of this contract and such other responsibilities and authorities as may be specified in the contract. The COTR for this contract shall be announced following award of the contract.

It is understood and agreed that the COTR shall not have authority to make any changes in the specifications/scope of work or terms and conditions of the contract.

Contractor may be held fully responsible for any changes not authorized in advance in writing by the Contracting Officer may be denied compensation or other relief for any additional work performed that is not so authorized, and may also be required, at no additional cost to the District, to take all corrective action necessitated by reason of the unauthorized changes.

vii. Publicity

The Offeror shall at all times obtain the prior written approval from the Contracting Officer before it, any of its officers, agents, employees or subOfferors, either during or after expiration or termination of the contract, make any statement, or issue any material, for publication through any medium of communication, bearing on the work performed or data collected under this contract.

viii. Freedom of Information Act

The District of Columbia Freedom of Information Act (DC FOIA), at D.C. Official Code §2-532 (a-3), requires the District to make available for inspection and copying any record produced or collected pursuant to a District contract with a private Contractor to perform a public function, to the same extent as if the record were maintained by the agency on whose behalf the contract is made. If the Contractor receives a request for such information, the Contractor shall immediately send the request to the COTR who will provide the request to the FOIA Officer for the agency with programmatic responsibility in accordance with DC FOIA. If the agency with programmatic responsibility receives a request for a record maintained by the Contractor pursuant to the contract, the COTR will forward a copy to the Contractor. In either event, the Contractor is required by law to provide all responsive records to the COTR within the timeframe designated by the COTR. The FOIA Officer for the agency with programmatic responsibility will determine the releasability of the records. The District will reimburse the Contractor for the costs of searching and copying the records in accordance with D.C. Official Code §2-532 and Chapter 4 of Title 1 of the *D.C. Municipal Regulations*.

ix. Protection of Property

The Offeror shall be responsible for any damage to the building, interior, or their approaches in delivering equipment covered by the contract.

x. Advisory and Assistance Services (Independent Contractor)

This contract is a "non-personal services contract". It is therefore, understood and agreed that the Offeror and the Offeror's employees: (1) shall perform the services specified herein as independent contractors, not as employees of the government; (2) shall be responsible for their own management and administration of the work required and bear sole responsibility for complying with any and all technical, schedule, financial requirements or constraints attendant to the performance of this contract; (3) shall be free from supervision or control by any government employee with respect to the manner or method of performance of the service specified; but (4) shall, pursuant to the government's right and obligation to inspect, accept or reject work, comply with such general direction of the Contracting Officer, or the duly authorized representative as is necessary to ensure accomplishment of the contract objectives.

xi. Confidentiality

All information obtained by the Offeror relating to any employee or customer of the District will be kept in absolute confidence and shall not be used by the Offeror in connection with any other matters, nor shall any such information be disclosed to any other person, firm, or corporation, in accordance with the District and Federal laws governing the confidentiality of records.

Offeror and each of its employees or sub- contractor's must also maintain the confidentiality and security of records in compliance with the Family Educational Rights and Privacy Act (FERPA).

xii. Conflict of Interest

The Offeror represents and covenants that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of its services hereunder. The Offeror further covenants that, in the performance of the contract, no person having any such known interests shall be employed.

xiii. Subcontracts

The Offeror hereunder shall not subcontract any of the Offeror's work or services to any sub contractor without the prior written consent of the Contracting Officer. Any work or service so subcontracted shall be performed pursuant to a subcontract agreement, which the District will have the right to review and approve prior to its execution by the Contractor. Any such subcontract shall specify that the Contractor and the sub contractor shall be subject to every provision of this contract. Notwithstanding any such subcontract approved by the District, the Contractor shall remain liable to the District for all Contractor 's work and services required hereunder.

xiv. Rights in Data

In addition to the ownership of all deliverables identified in the Offeror's proposal, the District of Columbia shall retain all rights to data and information created under this contract.

xv. Insurance Requirements

The Offeror shall procure and maintain, during the entire period of performance under this contract, the types of insurance specified below. The Offeror shall have its insurance broker or insurance company submit a Certificate of Insurance to the Contracting Officer giving evidence of the required coverage prior to commencing performance under this contract. In no event shall any work be performed until the required Certificates of Insurance signed by an authorized representative of the insurer(s) have been provided to, and accepted by, the Contracting Officer. All insurance shall be written with financially responsible companies authorized to do business in the District of Columbia or in the jurisdiction where the work is to be performed and have an A.M. Best Company rating of A-VIII or higher. The Offeror shall require all of its subOfferors to carry the same insurance required herein. The Offeror shall ensure that all policies provide that the Contracting Offocer shall be given thirty (30) days prior written notice in the event the stated limit in the declarations page of the policy is reduced via endorsement or the policy is canceled prior to the expiration date shown on the certificate. The Offeror shall provide the Contracting Officer with ten (10) days prior written notice in the event of non-payment of premium.

- Commercial General Liability Insurance. The Offeror shall provide evidence satisfactory to the Contracting Officer with respect to the services performed that it carries $1,000,000 per occurrence limits; $2,000,000 aggregate; Bodily Injury and Property Damage including, but not limited to: premises-operations; broad form property damage; Products and Completed Operations; Personal and Advertising Injury; contractual liability and independent Offerors.

The policy coverage shall include the District of Columbia as an additional insured, shall be primary and non-contributory with any other insurance maintained by the District of Columbia, and shall contain a waiver of subrogation. The Offeror shall maintain Completed Operations coverage for five (5) years following final acceptance of the work performed under this contract.

- Automobile Liability Insurance. The Offeror shall provide automobile liability insurance to cover all owned, hired or non-owned motor vehicles used in conjunction with the performance of this contract. The policy shall provide a $1,000,000 per occurrence combined single limit for bodily injury and property damage.

- Workers' Compensation Insurance. The Offeror shall provide Workers' Compensation insurance in accordance with the statutory mandates of the District of Columbia or the jurisdiction in which the contract is performed.

- Employer's Liability Insurance. The Offeror shall provide employer's liability insurance as follows: $500,000 per accident for injury; $500,000 per employee for disease; and $500,000 for policy disease limit.

The Offeror shall carry all required insurance until all contract work is accepted by the District, and shall carry the required General Liability; any required Professional Liability; and any required Employment Practices Liability insurance for one (1) years following final acceptance of the work performed under this contract.

These are the required minimum insurance requirements established by the District of Columbia. HOWEVER, THE REQUIRED MINIMUM INSURANCE REQUIREMENTS PROVIDED ABOVE WILL NOT IN ANY WAY LIMIT THE OFFEROR'S LIABILITY UNDER THIS CONTRACT.

The Offeror shall immediately provide the Contracting Officer with written notice in the event that its insurance coverage has or will be substantially changed, canceled or not renewed, and provide an updated certificate of insurance.
The Offeror shall submit certificates of insurance giving evidence of the required coverage as specified in this section prior to commencing work. Evidence of insurance shall be submitted to the Contracting Officer.

xvi. Contractor's Property

Contractor and sub contractor s are solely responsible for any loss or damage to their personal property, including but not limited to tools and equipment, scaffolding and temporary structures, rented machinery, or owned and leased equipment. A waiver of subrogation shall apply in favor of the District of Columbia.

xvii. Disclosure of Information

The Offeror agrees that the District may disclose the name and contact information of its insurers to any third party which presents a claim against the District for any damages or claims resulting from or arising out of work performed by the Offeror, its agents, employees, servants or subOfferors in the performance of this contract.

xviii. Governing Law

The resultant contract shall be governed by, and construed in accordance with the laws of the District of Columbia.

xix. Proposal Protests

Any prospective Offeror, who is aggrieved in connection with the solicitation or award of the resultant contract, must file with the Contracting Officer a protest no later than 10 business days after the basis of protest is known or should have been known, whichever is earlier. A protest based on alleged improprieties in a solicitation which are apparent at the time set for receipt of initial responses shall be filed with the Contracting Officer prior to the time set for receipt of initial responses.

In procurements in which responses are requested, alleged improprieties which do not exist in the initial solicitation, but which are subsequently incorporated into the solicitation, must be protested no later than the next closing time for receipt of responses following the incorporation. The protest shall be filed in writing, with the Contracting Officer, 810 1st. Street, N.W., 9th Floor, Washington, D.C. 20002.

The Contracting Officer shall render a decision within 10 days of receiving a protest.

The decision of the Contracting Officer is appealable to the State Superintendent of Education. The decision of the State Superintendent shall be final with no further right of appeal to the Contract Appeals Board or any other courts.

24. CONTRACT TYPE:

The District contemplates award of a firm fixed-price contract.

25. PRICE SCHEDULE:

Base Year

Item No.	Description	Total Amount
1.	Unique Student Identifier Solution: Project Management & Implementation; Change Control Plan; Data Migration; Test Plan/Methodology; User Acceptance Testing Plan; System Security Plan; Training.	$_____
	Base Year of Performance Total	**$_____**