



**REQUEST FOR INFORMATION (RFI)**  
**Solicitation No. RFI-PCSB-01**

DISTRICT OF COLUMBIA PUBLIC CHARTER SCHOOL BOARD (PCSB)

## **A. INTRODUCTION**

- A.1 The District of Columbia Public Charter School Board (“PCSB”) is seeking information from Industry sources interested in providing technology services for Salesforce programming. Consequently, all sources are invited to submit information, comments, feedback and recommendations for this service request
- A.2 PCSB was authorized pursuant to the District of Columbia School Reform Act of 1995, D.C. Code §§ 38-101 *et seq.*, to grant charters to establish public charter schools in the District of Columbia. PCSB is responsible for receiving and reviewing applications to develop public charter schools; awarding or denying requests for charters; monitoring the operations of public charter schools and the progress of their students; monitoring schools’ compliance with applicable laws; not renewing the charters of schools that fail to meet their goals, or revoking charters of schools that contravene applicable laws, fail to meet their goals, or engage in fiscal mismanagement.
- A.3 Public charter schools operate independently of the District of Columbia Public School system. In exchange for significant operating autonomy, public charter schools are accountable for the performance of their students as measured by the specific educational goals that they set

## **B. BACKGROUND**

- B.1 PCSB monitors the financial stability of all public charter local education agencies (LEAs). Since 2011 PCSB has used Salesforce to maintain schools’ financial data, calculate accounting ratios, and produce individual school reports through a mail merge with Microsoft Word. Also, a new evaluation tool is managed in Microsoft Excel. PCSB requires updates to its Salesforce database to integrate all of its processes into the one platform.
- B.2 *Financial Audit Review (FAR) Methodology*

The current process for evaluation is as follows:

1. On an annual basis, PCSB collects audited financial statements and summary data in an Excel template. These files are uploaded into Salesforce.
2. The raw data for all LEAs in Salesforce is exported as an Excel document.
3. The raw data is transferred to a separate Excel file that maintains the methodology.

Using the pre-populated formulas, the model calculates various financial ratios for each charter school.

### B.3 *Internal Report Generation*

To generate the internal reports, data in Salesforce is downloaded into an Excel spreadsheet. This data is then mail merged into a word document. The new process should allow reports to be generated directly in Salesforce.

## C. DEFINITIONS

C.1 These terms when used in the RFI have the following meanings:

LEA: Local Education Agency

## D. SCOPE

D.1 The Request for Information (RFI) is issued on behalf of PCSB the purpose of soliciting best practices from industry in the areas of technology creation for Salesforce infrastructure.

The main outcome expected from this outreach initiative is to assess methods and vendor qualifications to do the following:

1. Integrate an offline Excel-based model into Salesforce; and
2. Develop an infrastructure and process to generate public-facing reports within Salesforce.

D.2 PCSB seeks best practices from industry on how to deliver comprehensive services that:

1. Streamline the processes relating to uploading data and producing reports within the Salesforce database;
2. Allow for multiple evaluation models to be maintained within the Salesforce database; and,
3. Document system enhancements to incorporate into the organization's knowledge management repository.

## E. RFI INSTRUCTIONS

E.1 THIS IS A REQUEST FOR INFORMATION (RFI) ONLY:

This RFI is released pursuant to the laws, rules and the regulations under which the PCSB operates (<http://ocp.dc.gov/page/laws-regulations-ocp>). This RFI is issued solely for information, planning purposes, and market research; it does not constitute a Request for Proposal (RFP) or a promise to issue an RFP. This RFI does not commit PCSB to contract for any supply or service. PCSB will not pay for any cost associated

with responding to this RFI. All costs will be solely at the interested party's expense. Not responding to this RFI does not preclude participation in any future RFP. The information provided in this RFI is subject to change and is not binding on PCSB. All submissions become the property of PCSB, and will not be returned.

- E.2 This RFI is an opportunity for Vendors to suggest or identify additional capabilities that may be of interest to the District. PCSB will accept appendices, marketing brochures, etc., as long as they are in separate files, named in the initial submission, and in the Portable Document Format

## **F. REQUESTED INFORMATION**

- F.1 PCSB is looking for a technology-based vendor that has a deepened understanding of Salesforce. The vendor should understand and be able to meet the need PCSB has for the creation of an information management and information output infrastructure as detailed in Section 4.
- F.2 The final product shall integrate all report generation processes and evaluation tools into the Salesforce database. The evaluation methodologies should allow for future adjustments to calculations. The standard reports should allow the user to customize as needed. All reports should be generated with minimal effort.
- F.3 The Vendor shall be able to demonstrate that its staff has sufficient skills, experience and capacity to implement the necessary system enhancements by December 01, 2015.
- F.4 Responses shall include the following information:
1. Introduction of the company, company structure, business size etc.
  2. Technical description of services offered to meet PCSB needs.
  3. Details about training approach for a customer that is the same size like PCSB
  4. Past performance, experience with engaging other local government entities, States or other companies with Salesforce or other like programs: Vendor shall include at least three past performance evaluation form as per the attachment 1 (Past Performance Evaluation Form)
  5. Estimated Project plan from date of award to final delivery of integrated solution including the necessary milestones for Salesforce engagement
- F.5 The Vendor may be invited to provide a live demonstration presentation to PCSB.
- F.6 The Vendor shall provide the price structure if applicable.
- F.7 The Vendor shall provide a detailed price estimate for each phase of the project. The estimate should include a list of personnel involved and title, the number of hours and the price per hour.

## **G. RESPONSES TO RFI**

- G.1 Responses to this RFI must be submitted via e-mail to [Operations@dcpsb.org](mailto:Operations@dcpsb.org). Paper, telegraphic, and facsimile proposals will not be accepted.
- G.2 All attachments shall be submitted as a .pdf file. The District will not be responsible for corruption of any file submitted. If the submitted file cannot be viewed and printed as submitted, it will not be considered.
- G.3 Please note that each attachment is limited to a maximum size of 9MB. Oversized packages cannot be received.
- G.4 This RFI does not commit PCSB to any subsequent action. The discretion, and any use of information provided by responses to the RFI, rests solely with PCSB. Should any action result, it will be by PCSB and in full compliance with applicable law and policy.
- G.5 Response to this RFI must be provided no later than October 30, 2015 at 5:00 pm via email to Yariany Perez-Nieto (Operations Assistant) at [Operations@dcpsb.org](mailto:Operations@dcpsb.org).

## **H. CONTRACTING OFFICER**

### **The Contracting Officer for this RFI is:**

Scott Pearson  
Executive Director  
District of Columbia Public Charter  
School Board  
3333 14th Street, N.W. Suite 210  
Washington, DC 20010  
[spearson@dcpsb.org](mailto:spearson@dcpsb.org)

## **CONFIDENTIALITY**

Any document submitted in response to this RFI that contains confidential information must be marked as containing confidential information. Each page upon which confidential information appears must be marked as containing confidential information. The confidential information must be clearly identifiable to the reader wherever it appears. All other information will not be treated as confidential. All information marked confidential in RFI responses is only for the PCSB's use in planning for future acquisitions.

**PAST PERFORMANCE EVALUATION FORM**

(Check appropriate box)

Performance Elements	Excellent	Good	Acceptable	Poor	Unacceptable
Quality of Services/ Work					
Timeliness of Performance					
Cost Control					
Business Relations					
Customer Satisfaction					

1. Name & Title of Evaluator: \_\_\_\_\_
2. Signature of Evaluator: \_\_\_\_\_
3. Name of Organization: \_\_\_\_\_
4. Telephone Number of Evaluator: \_\_\_\_\_
5. State type of service received: \_\_\_\_\_
6. State Contract Number, Amount and period of Performance \_\_\_\_\_  
\_\_\_\_\_
7. Remarks on Excellent Performance: Provide data supporting this observation. Continue on separate sheet if needed)
8. Remarks on unacceptable performance: Provide data supporting this observation. (Continue on separate sheet if needed)

## RATING GUIDELINES

Summarize Contractor performance in each of the rating areas. Assign each area a rating of 0 (Unacceptable), 1 (Poor), 2 (Acceptable), 3 (Good), 4(Excellent), or ++ (Plus). Use the following instructions a guidance in making these evaluations.

	<b>Quality Product/Service</b>	<b>Cost Control</b>	<b>Timeless of Performance</b>	<b>Business Relations</b>
	<ul style="list-style-type: none"> <li>-Compliance with contract requirements</li> <li>-Accuracy of reports</li> <li>-Appropriateness of personnel</li> <li>-Technical excellence</li> </ul>	<ul style="list-style-type: none"> <li>-Within budget (over/ under target costs)</li> <li>-Current, accurate, and complete billings</li> <li>-Relationship of negated costs to actual</li> <li>-Cost efficiencies</li> <li>-Change order issue</li> </ul>	<ul style="list-style-type: none"> <li>-Meet Interim milestones</li> <li>-Reliable</li> <li>-Responsive to technical directions</li> <li>-Completed on time, including wrap-up and contract administration</li> <li>-No liquidated damages assessed</li> </ul>	<ul style="list-style-type: none"> <li>-Effective management</li> <li>-Businesslike correspondence</li> <li>-Responsive to contract requirements</li> <li>-Prompt notification of contract problems</li> <li>-Reasonable/cooperative</li> <li>-Flexible</li> <li>-Pro-active</li> <li>-effective contractor recommended solutions</li> <li>-Effective snail/small disadvantaged business Subcontracting program</li> </ul>
<b>0. Zero</b>	Nonconformances are comprises the achievement of contract requirements, despite use of Agency resources	Cost issues are comprising performance of contract requirements.	Delays are comprising the achievement of contract requirements, Despite use of Agency resources.	Response to inquiries, technical/ service/administrative issues is not effective and responsive.
<b>1, Unacceptable</b>	Nonconformances require major Agency resources to ensure achievement of contract requirements.	Cost issues require major Agency resources to ensure achievement of contract requirements.	Delays require major Agency resources to ensure achievement of contract requirements.	response to inquiries, technical/ service/administrative issues is marginally effective and responsive.
<b>2. Poor</b>	Nonconformances require minor Agency resources to ensure achievement of contract requirements.	Costs issues require minor Agency resources to ensure achievement of contract requirements.	Delays require minor Agency resources to ensure achievement of contract requirements.	Responses to inquiries, technical/ service/administrative issues is somewhat effective and responsive.
<b>3. Acceptable</b>	Nonconformances do not impact achievement of contract requirements.	Cost issues do not impact achievement of contract requirements.	Delays do not impact achievement of contract requirements.	Responses to inquires, technical/ service/administrative issues is usually effective and responsive.
<b>4. Good</b>	There are no quality problems.	There are no cost issues.	There are not delays.	Responses to inquiries, technical/ service/administrative issues is effective and responsive,
<b>5. Excellent</b>	The contractor has demonstrated an exceptional performance level in some or all of the above categories.			