**REQUEST FOR QUOTES**

**Software as a Service Solution**

**To accomplish**

**Content Management and Content Utilization**

**for**

**Professional Learning**

**Issue Date: Friday, March 9, 2015**

**Due Date: Friday, March 20, 2015**

To be considered, submissions must be signed and returned via email to mcheung@wested.org. No physical copies will be accepted.

Submissions will be considered valid for a period of 60 calendar days after the submission due date.

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# **Introduction**

WestEd invites you to submit a response to this Request for Qualifications (“RFQ”) for providing a content management and content utilization for professional learning. The solution will be a corner stone application of a Technical Assistance Platform that supports the management and provisioning of technical assistance including support for professional learning and knowledge utilization. Other applications include a Technical Assistance Management Application operating on force.com, Salesforce Identity providing identity and access management capabilities, and Wordpress used for the project Website. Working together, these solutions will support the work of two technical assistance centers.

WestEd is seeking a software as a service application that includes:

* Configuration, implementation assistance, and support for two Technical Assistance Centers each operating separately with the ability to share select content and learning activities;
* Solution capabilities to meet the professional learning and knowledge utilization needs of a maximum of 6,000 clients associated with two national Technical Assistance centers;
* Ongoing improvements of functions and features that improve the learning and knowledge management capabilities of the solution during the contract period;
* Application program interfaces and SAML 2.0 capabilities that allow for the integration with other services and applications that comprise the TA Platform.

The outcome of this RFQ process will be a contract to provision and support a content management and utlization application to support professional learning as a service through September 30th 2017 upon WestEd’s acceptance of a contract and budget that includes an option to continue use of the service through September 30th 2019.

This RFQ contains background information on WestEd and specific information that must be included in the submission. An electronic submission is due to mcheung@wested.org by 10:00 AM Pacific Standard Time on Friday, March 20 2015.

# **Background**

## 2.1 Company Background

WestEd is a not-for-profit research, development, and service agency that works with education and other communities to promote excellence, achieve equity, and improve learning for children, youth, and adults. WestEd has over 640 employees, located in 16 offices across the United States.

WestEd is a Joint Powers Agency (“JPA”) formed under the California Joint Exercise of Powers Act and governed by public entities in Arizona, California, Nevada, and Utah. WestEd’s Board of Directors is comprised of members representing agencies from these states, as well as other national education and business leaders.

## 2.2 Project Background

WestEd was awarded two grants from the U.S. Department of Education Office of Special Education (OSEP) to provide two national centers (“Centers”) , the National Center for Systemic Improvement (“NCSI” - <http://ncsi.wested.org>) and the Center for IDEA Fiscal Reporting (“CIFR” -<http://cifr.wested.org/>). The Centers provide technical assistance to states and territories to improve their special education services.

Each of these Centers is comprised of staff from within WestEd as well as multiple partner organizations. NCSI has approximately 62 staff; CIFR has approximately 41 staff.

WestEd is building a Digital TA Platform to support the work of these two Centers. This platform may also be used to support other similar technical assistance efforts in the future.

The business goals of the system related to this RFQ are to:

* Facilitate knowledge utilization and professional learning at a national level for state agency staff associated with efforts to improve results for children with disabilities, and support continued compliance with IDEA;
* Enable technical assistance staff to engage and support clients through the management and effective utilization of content used to accelerate implementation and scaling up of evidence-based practices.

# **Project Description**

WestEd is seeking a service provider to provide capabilities that improve the centers’ abilities to support knowledge utilization and social learning with staff and clients, and to interface with other systems providing complementary services. The following outlines the necessary service requirements and deliverables.

## 3.1 Service Requirements

1. WestEd requires a service-based solution accessible through common web browsers;
2. The service must be operational within 30 days and fully functional within 90 day;
3. Cost of annual licensing should not to exceed $60,000 per project calendar year;
4. Mobile interface capabilities are desired but not an absolute requirement.

## 3.2 Service Deliverables

The Service should provide the following capabilities:

3.2.1 Knowledge Management:

1. Enable center staff to identify, collect, and manage content and content references across multiple content repositories. Content types should include:
   * HTML content
   * .docx
   * .xlsx
   * .pdf
   * .pptx
2. Provide a repository to store content created in a wide variety of media types, including video and audio;
3. Enable staff to organize collections of content to address specific topic areas;
4. Provide the ability to limit access of content collections to a specific group of users;
5. Enable each TA Center to organize and share content independently or across centers as desired to support collaborations across defined groups of users;
6. Provide ability to create and maintain content metadata to inform content recommendation engine.

3.2.2 Knowledge Utilization:

1. Enable clients to accelerate knowledge utilization with the ability to easily find content relevant to their immediate interests and needs;
2. Public content can be organized, searched, and displayed without logging in;
3. Center staff can use a “share this” type of feature to share a resource with clients;
4. Clients receive recommendations of content that address their specific interests from center staff and through recommendation engine technology based on an active profile of a user’s activities and interests;
5. Center staff can promote content collections to all users or to targeted users based on profile and usage data;
6. Center staff can manage and moderate content highlighting and messaging;
7. Share technical assistance application tools within collections via URL references.

3.2.3 Social Learning:

1. Provide clients with social learning opportunities focused on content utilization based on best practices related to one or more state’s performance objectives;
2. Clients and Center staff receive recommendations on users or groups of users who may share similar interests;
3. Center staff and clients can share content highlights that include notes and comments;
4. Messaging to support group work;
5. Invitation based work groups that can organize collections and engage in messaging to support content review, social learning and work group conversations.

System Configuration, Interface, and Integration Deliverables:

1. Provide each TA center with separate visual branding and organizational capabilities as separate tenants using a shared system that can selective internetworking across TA centers;
2. Be easy to use, friendly, and provide a consistently positive user experience;
3. Support a common user experience through the licensed use of UX design elements that can be used in other Digital Technical Assistance Platform applications;
4. Be compliant with Federal standards defined for accessibility, security and privacy;
5. Support the integration of 3rd party applications via APIs including:
   * 1. Data exchange with a TA management application developed in Force.com
     2. Appropriate exchange of data with a project evaluation system using MySQL and Expression Engine CMS
     3. Possible integrations with meeting systems such as WebEx and Adobe Connect
     4. Possible integrations with event or calendaring systems.
     5. Other applications based on open standards;
6. Integration of Box.com as a file sharing repository, including synching of content and display of content directly from Box;
7. Support for SAML 2.0 to enable the use of Salesforce Identity for single-sign-on and identity management tasks between Platform applications and services that require client and staff authentication;
8. Provide easy to use and configurable usage reporting and analytics.

## 3.3 Project Milestones

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| --- | --- |
| **Project Milestones** | **Dates** |
| Service Configuration Begins | April 1st, 2015 |
| Service is Operational | May 1, 2015 |
| Service has complete functionality | July 1, 2015 |

# **Vendor Requirements**

The following are the evaluation criteria for vendors:

* Qualifications, experience, references, and ability to carry out the described work;
* Capacity to configure and provide the service in the given time frame;
* Proven track record in providing services that provide content management, content utilization and social learning capabilities as a fully hosted solution in nonprofit, government or education sectors;
* Ability and experience in supporting clients in the implementation of content utilization and social learning projects;
* A demonstrated understanding of how to successfully configure the proposed service in a SAML environment using Salesforce Identity as the system of record;
* Proven track record in designing easy-to-use interfaces and exceptional user experiences.

# **RFQ Timelines and Process**

## 5.1 Projected RFQ Schedule

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| --- | --- |
| **RFQ Activity** | **Dates** |
| RFQ Released on WestEd.org | March 9, 2015 |
| Questions Due by bidders | Friday, March 13th, 2015 |
| Response to questions posted | Tuesday, March 17, 2015 |
| Proposal Submissions Due Date | Friday, March 20, 2015 by 10:00 AM (PST) |
| Award Notice | Tuesday, March 24th, 2015 |
| Meet with Selected Service Provide to begin work | Between Wednesday, March 25, 2015 and Friday March 27, 2015 |

## 5.2 Notice to Offer(s)

All materials provided to WestEd become the property of WestEd and may be returned only at its sole discretion. WestEd is a public entity. All proposals and any materials submitted with a proposal may be deemed public records subject to disclosure pursuant to the California Public Records Act. No portion of any proposal or materials submitted therewith will be withheld from disclosure as proprietary, trade secret or confidential unless that portion is clearly marked by the proposer as such, and the proposer agrees to indemnify WestEd against any claim or action to compel disclosure of such portion of the proposal. WestEd is not obligated to accept any proposal or to negotiate with any entity. All transactions are subject to the final approval of WestEd, which reserves the right to reject any and all proposals without liability. All costs directly or indirectly related to a response to this RFQ will be borne by the proposer.

The contract, if any shall be awarded to the responsible proposer whose proposal is most advantageous to WestEd, based on the evaluation criteria set forth in this RFQ. WestEd may at its sole discretion select the response that best fits its needs, may choose to cancel the RFQ, or to not select any offeror. A selection committee will evaluate the responses based on established criteria including compliance with the direction herein, experience and qualifications, cost, financial position of the company, and other factors as stated in this RFQ. If selected, the successful firm will enter into a written agreement with WestEd that will include service agreements and compensation agreements.

All information in this RFQ should, for purposes of this RFQ, be considered proprietary and confidential. Information contained in this RFQ should not be shared or distributed without the expressed written consent of WestEd.

## 5.3 Rejection of Proposals

WestEd reserves the right in its sole discretion to reject any or all proposals, in whole or in part, without incurring any cost or liability whatsoever. All proposals will be reviewed for completeness of the submission requirements. The proposal may be rejected if it fails to meet a material requirement of the RFQ, or if it is incomplete or contains irregularities. A deviation is material to the extent that a proposal is not in substantial accord with RFQ requirements.

Immaterial deviations may cause a bid to be rejected. WestEd may or may not waive an immaterial deviation or defect in a proposal. WestEd’s waiver of an immaterial deviation or defect will in no way modify the RFQ or excuse a bidder from full compliance with the RFQ requirements.

Any proposal may be rejected where it is determined to be not competitive, or where the cost is not reasonable.

Proposals that contain false or misleading statements may be rejected if in WestEd’s opinion the information was intended to mislead WestEd regarding a requirement of the RFQ.

WestEd may reject a proposal from a proposer it finds nonresponsible. Any person or entity that has substantially assisted WestEd in preparing any part of this RFQ is prohibited from submitting a proposal. Submission of a proposal to WestEd shall constitute the proposer’s certification that the proposal is not collusive.

## 5.4 Compliance with Laws

Any offeror must affirmatively agree and certify that it will comply with all applicable federal, state, and local laws and regulations, including but not limited to the provisions of the Fair Employment and Housing Act (Govt. Code, § 12900 et seq.) and any applicable regulations promulgated there under (Cal. Code of Regs., tit. 2, § 72850.0 et seq.). Any offeror must affirmatively agree to include the non-discrimination and compliance provisions of this clause in any and all subcontracts to perform work under the agreement.

## 5.5 Written Questions and Addenda

Written questions or comments regarding this RFQ must be in writing and received no later than 4 p.m. on Friday, March 13, 2015. Questions should be emailed to Melissa Cheung mcheung@wested.org. All questions will be responded to in writing. Offeror(s) invited to submit understand and agree that they have an affirmative duty to inquire and seek clarification regarding anything in this RFQ that is unclear or open to more than one interpretation.

WestEd, at its sole discretion, may make questions submitted by offerors and responses to the submitted questions available to all offerors.

WestEd reserves the right in its sole discretion to revise or amend this RFQ prior to the stated submittal deadline. Any such revisions will be made by written addenda to this RFQ. Proposers are responsible for verifying they have received, and all proposals shall acknowledge receipt of, all addenda issued by WestEd relating to this RFQ. Failure to acknowledge receipt of all such addenda may render a proposal nonresponsive

## 5.6 Submissions

Electronic copies of responses must be received by 10:00 AM Pacific time on the due date. Any response received after this date and time may be returned or not considered. Responses should be submitted electronically to Melissa Cheung at mcheung@wested.org .

Submission of a proposal shall constitute the proposer’s representation that it:

* Has thoroughly examined and become familiar with the scope of work set forth in this RFQ;
* Understands the requirements of the scope of work, the nature of the work and all other matters that may affect the work;
* Will honor its proposal for no less than 60 days after the submission date stated in this RFQ (or until execution of a final contract with the selected proposer, if sooner), and acknowledges that its proposal cannot be withdrawn within that time without the written consent of WestEd;
* Will comply with all requirements set forth in this RFQ, and in the ensuing contract, if any; and

## 5.7 Protests

Following the selection of the apparent successful proposer, WestEd shall notify all proposers of its intent to award a contract to such proposer. Any protest to the award of the contract to the apparent successful proposer shall be submitted to WestEd in writing within no less than five (5) calendar days from the date of such notice. Any protest shall state with specificity the ground on which the protestor alleges the contract may not be awarded to the apparent successful proposer. WestEd shall consider any properly submitted protest and may accept or reject such protest as it determines appropriate in its sole discretion.

## 5.8 WESTED CONTACT

All communications, including any requests for clarification, concerning this RFQ should be addressed in writing to the following:

Melissa Cheung

Senior Project Manager

mcheung@wested.org