**REQUEST FOR PROPOSAL**

**Issue Date: Monday, January 26, 2015**

**~~Due Date: Friday, February 6, 2015~~**

**Updated Due Date: Monday, February 9, 2015; 10am PT**

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.

# Table of Contents

1. Introduction
2. Company and Project Background
3. Project Description
4. Vendor Requirements
5. RFQ Process and Timeline

Appendix A – Data Models and Use Cases

Appendix B – Submission Format

**Changes (all indicated in yellow):**

2/2/15

* Updated Due date to Monday 10:00 AM PST.
* Clarified in 5.6 Submissions – Proposals are good for 60 days, not 120 days.

# **Introduction**

WestEd invites you to submit a response to this Request for Qualifications (“RFQ”) for designing a technical assistance management system (“TA Management System”). The System will use Salesforce force.com as a cornerstone element and will combines the use of other compatible solutions that support specific professional learning and knowledge utilization needs.

WestEd is seeking a technology development partner to:

* Finalize discovery work already in process and develop a complete set of specifications and a design (“Design”) that meet the requirements and needs of two national Technical Assistance centers as outlined in this document.
* Develop a Scope of Work (“SOW”) and budget to implement and deploy the design using Salesforce’s force.com solution. (“Implementation”)

The outcome of this RFQ process will be a contract to support the design phase with an option to award an implementation contract upon WestEd’s acceptance of the Implementation SOW and budget.

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 Monday, February 9, 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 recently awarded a 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 an aspect of special education in their states.

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 Management System to support the technical assistance 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 this system are to:

* Enable Center staff to build a complete profile of State and US territories that includes records about State agencies, individual staff, and the progress of each entity based on a plan and/or set of objectives.
* Enable streamlined, coordinated, and cohesive communication to States from various working teams.
* Improve communication internally between Center staff, who are new to each other, and where processes for work are still being defined.
* Provide an organizing tool for assignments, reviewing, and reporting of work on a daily basis.
* Make it easy to gather and report on activities for clients, funders, and evaluators periodically.
* Enable tracking and reporting of collaboration, social learning, and knowledge management and utilization activities from an external system.

# **Project Description**

WestEd is interested in working with a vendor to help design a solution based on Force.com to track the work and communication of the Centers with the states and territories, to improve the centers’ abilities to support collaboration with staff and clients, and to report and track data. The following outlines requirements of systems and for the SOW. Submission formats are detailed in Appendix B.

## 3.1 System Requirements

The TA Management System must:

* Be built in Salesforce, utilizing Force.com and other necessary applications
* Enable the two Centers to share one Salesforce Org without visible sharing of data across Centers to primary users, unless desired for specific collaborations using defined groups of records.
* Allow for specific integration with 3rd party applications via APIs, with a data architecture that will also supports future integrations. Examples include:
  + Use of a compatible platform designed to support professional learning, knowledge utilization, and content management across multiple sites.
  + Appropriate exchange of data with a project evaluation system using MySQL and Expression Engine CMS.
  + Possible integrations with meeting systems such as WebEx and Adobe Connect.
  + Potential Salesforce Partner applications.
  + Use of Box.com capabilities for file sharing
* Use Salesforce Identity for single-sign-on and identity management tasks between the TA Management system and other Technical Assistance Platform elements that require client and staff authentication.
* Be easy to use, friendly, and designed with the Center staff in mind.
* Be compliant with industry standards for accessibility, security and privacy guidelines.

## 3.2 Design Deliverables

SOW should include the following deliverables:

1. **Refined Use Cases**   
   WestEd has developed a set of use cases, and will be generating user stories. We seek support in prioritizing and refining the use cases, and further developing stories as needed to inform the design. A list of use stories and uses cases is outline in Appendix A.
2. **User Experience Design Documentation**  
   This work should include detailed wireframes, workflow diagrams, process definition, and other specifications that define how users will interact with the system. Data and User Model work done to date is included in Appendix A.
3. **Visual Design Files**   
   WestEd has developed a brand identify for each of the Centers. We seek help extending the brand into template based visual skins to enable each Center to have distinctive brand elements that are selectively displayed to associated project staff.
4. **Data Architecture Documentation**  
   This work should include necessary documentation to specify architecture of the system, database fields and other documentation as need. This works should also include a plan for integration with compatible applications and platforms, including definition of data integration points that support cross platform workflow, reporting, and activities of each center, in defining the user experience for multiple teams, and in specifying how the technical implication will happen.
5. **Technical specifications and requirements**  
   This work should include any documentation that defines the requirements to implement the design.
6. **Implementation Plan**Provide a clearly laid out plan for implementing the Designs, with an agile development. The plan should also include responsive and ongoing support and maintenance.
7. **Implementation Estimate**Provide an estimate for Implementation based on the Design. The actual contract for this work will be negotiated after the design phase.

## 3.3 Project Milestones

|  |  |
| --- | --- |
| **Project Milestones** | **Dates** |
| Work Begins | Monday, February 23 – Friday, February 27, 2015 |
| Design Phase Complete | March 2015 |
| Implementation Phase Complete | May 2015 |



# **Vendor Requirements**

The following are the evaluation criteria for vendors:

* Qualifications, experience, references, and ability to carry out the described work
* Capacity to complete the work in the given time frame.
* Proven track record in designing and implementing force.com projects in nonprofit, government or education sectors
* Ability and experience designing and implementing Integrations with Salesforce.
* Ability and experience separating design and Implementation projects
* A demonstrated understanding of how to successfully configure and use Salesforce Identify with compatible applications in a SAML environment.
* Proven track record in designing easy-to-use interfaces for Saleforce.

# **RFQ Timelines and Process**

## 5.1 Projected RFQ Schedule

|  |  |
| --- | --- |
| **RFQ Activity** | **Dates** |
| RFQ Released on WestEd.org | Monday, January 26, 2015 |
| Questions Due by bidders | Friday, January 30, 2015 |
| Response to questions posted | Tuesday, February 10, 2015 |
| Proposal Submissions Due Date | Monday, February 9, 2015 by 10:00 AM (PST) |
| Award Notice | Friday, February 13, 2015 |
| Meet with Selected Vendor to begin work | Between Monday, February 23 – Friday February 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, February 6, 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 in the format outlined in Appendix B.

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

Please include “RFQ – TA Management System” in the subject line.