

APPLE VALLEY UNIFIED SCHOOL DISTRICT



REQUEST FOR PROPOSAL (RFP)

RFP # 25-1

STUDENT INFORMATION SYSTEM

FOR THE
APPLE VALLEY UNIFIED SCHOOL DISTRICT

PROPOSAL DEADLINE DATE:

October 3, 2025

By 2:00 p.m.

SUBMIT PROPOSALS TO:

APPLE VALLEY UNIFIED SCHOOL DISTRICT
ATTN# TECH SERVICES SIS RFP
12555 Navajo Rd Apple Valley, CA 92308
bid@avusd.org

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1. GENERAL INFORMATION

A. INTRODUCTION

The Apple Valley Unified School District (AVUSD or "District"), a suburban school district in San Bernardino County, serves approximately 14,000 students across 15 sites. This includes students in grades K-12, a state Pre-School Program, and an Adult Education program. AVUSD maintains a 1:1 learning environment, providing Chromebooks to students in grades 1st-12th and iPads to kindergarten students.

School Sites:

- Rancho Verde Elementary School - 14334 Pioneer Rd., Apple Valley, CA 92307
- Desert Knolls Elementary School – 18213 Symeron Dr., Apple Valley, CA 92307
- Sandia Academy – 21331 Sandia Rd., Apple Valley, CA 92308
- Rio Vista School – 13590 Havasu Rd., Apple Valley, CA 92308
- Sycamore Rocks Elementary - 23450 South Rd., Apple Valley, CA 92307
- Vanguard Preparatory – 12951 Mesquite Rd., Apple Valley, CA 92308
- Sitting Bull Academy - 19445 Sitting Bull Rd., Apple Valley, Ca 92308
- Apple Valley High School – 11837 Navajo Rd., Apple Valley, CA 9230
- High Desert Premier Academy – 21950 Nisqually Rd., Apple Valley Ca 92308
- Granite Hills High School - 22900 Esaws Rd., Apple Valley, CA 92307
- Yucca Loma Elementary School - 21351 Yucca Loma Rd., Apple Valley CA, 92307
- Mariana Academy - 10601 Manhasset Rd., Apple Valley, CA 92308
- Phoenix Academy - 20700 Thunderbird Rd., Apple Valley, CA 92307

District Office Sites:

- Educational Support Center (ESC or DO) - 12555 Navajo Rd., Apple Valley, CA 92308
- Maintenance Operations and Transportation Center (OPS) - 22974 Bear Valley Rd., Apple Valley, CA 92308

B. BACKGROUND

AVUSD is seeking a new Student Information System (SIS) to replace its long-standing Aeries system. The district transitioned from SASI in 2001 and adopted Aeries' centralized server in 2009. The Aeries SQL server retains data files dating back to 2009. This move is driven by a need for a more modern, efficient, and comprehensive solution to support evolving educational demands. Key motivations include:

- Modernization: A desire for updated workflows, database structures, and intuitive user interfaces, as the current system's older architecture limits efficiency and data access.
- Enhanced Features: Interest in advanced functionalities such as integrated tools, automation, and robust data dashboard features for real-time, actionable insights, supporting data-driven decision-making.
- Improved Support & Cost Efficiency: Evaluating the total cost of ownership, including the need for responsive and sustainable support, addressing concerns about rising costs or varying support levels from current providers.

C. SCOPE OF SERVICES

The Apple Valley Unified School District (AVUSD) is seeking proposals for a comprehensive, fully integrated student information system. The ideal system will not only fulfill the requirements outlined in this Request for Proposal (RFP) but also offer flexibility and scalability to accommodate future student data needs.

AVUSD is looking for a system that integrates the following modules:

- Registration
- Course Management
- Enrollment Data
- Attendance
- Transcripts & Grading
- Advisement
- Reporting
- Evaluations & Surveys
- Nutrition Services
- State Reporting

The ultimate scope of the new system and the timeline for its acquisition and implementation will be contingent upon the specific features of the proposed system, its overall responsiveness to this RFP, the capabilities of the proposing vendor, and the price. AVUSD's goal is to achieve a "go-live" status (as understood in the industry) by the first day of school on August 6, 2026. AVUSD is seeking a vendor with extensive experience in school solutions. To the greatest extent possible, AVUSD aims to implement a "vanilla" software package, meaning one that requires a minimal number of modifications to the base application.

D. SCHEDULE

The District reserves the right to change the dates on the schedule without prior notice.

EVENT	DATE
District Publishes RFP	August 22, 2025
Deadline for Questions from Proposers	September 5, 2025
District Publishes Addenda and Responses	September 12, 2025
Deadline to Submit Proposals	October 3, 2025
Proposal Evaluations - Stage 1	October 6 - 17, 2025
Proposer Presentations - Stage 2	October 20 - 24, 2025
Announcement of Recommendation	October 31, 2025
Board Meeting – Award of Contract	November 6, 2025

E. LENGTH OF CONTRACT

Depending on RFP submittals, project timelines, and available funding, the resulting three (3)-year contract with two (2) options to extend for one-year periods will cover a period from approximately November 6, 2025 through June 30, 2029. The installation and implementation of the Student Information System is to be completed on or before July 1, 2026.

F. CONTENTS OF PROPOSALS

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP. Utmost attention will be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables will be numbered and clearly labeled. The proposal will be organized into the following major sections:

1. Letter of Transmittal and Executive Summary (Maximum 3 Pages)

- **Executive Summary Narrative:** Provide a brief narrative summarizing your solution and understanding of the project, minimizing technical jargon.
- **Summary Cost Quotations:** Include summary-level cost quotations for software and services.
- **Primary Engagement Contacts:** Clearly identify primary contacts for the software Vendor, implementation services firm (if applicable), and any proposed third-party software. Include a valid email address and toll-free number for each.
- **Firm Suitability:** Briefly describe why your firm is well-suited to meet the District's needs.
- **Authorization for Discussion:** Clearly identify individual(s) authorized to speak for your firm during the evaluation process.
- **Agreement Acknowledgment:** Include one of the specified statements regarding the District's Independent Contractor Agreement for Services (Appendix "B").
- **Non-Solicitation Certification:** Certify that no District official or employee, or any business entity in which a District official has an interest, has been employed or retained to solicit or assist in procuring the contract(s), nor will any such person be employed in performance of contract(s) without immediate disclosure to the District.
- **Ethics Violation Certification:** Certify that no official or employee of your firm has ever been convicted of an ethics violation.
- **Truthfulness Certification:** Sign and include the specified statement: "By virtue of submission of this Proposal, INSERT PROPOSER'S NAME declares that all information provided is true and correct."

2. Company Background and Qualifications

- **General Company Information:** Provide company name, address, telephone, fax, website, name and email of main contact, Federal Tax I.D. Number, License or Registration Number, type of organization (e.g., corporation, partnership). If a joint venture, describe the division of responsibilities, primary office locations, and percentage interest of each firm. Include a brief description and history of the firm, including number of years in business and date established under its given name, and number of employees (licensed professionals, technical support).
- **Fiscal Stability:** Provide evidence of long-term fiscal stability, such as fiscal reports or

recent audit results, demonstrating consistent and current financial security. Financial information submitted in this section will be considered proprietary.

- **Independently Awarded Certifications/Credentials:** Describe any independently awarded certifications or credentials held by the Vendor or awarded to the proposed products (e.g., AWS Well Architected Solution, ISO 27001, SOC 2, FedRAMP, Digital Promise, WCAG compliance).
- **Personnel:** Identify key team members, including sub-consultants, and state their qualifications relevant to the scope of services for the Project(s). Each Proposal must include evidence that the proposer is legally permitted and properly licensed to conduct business in the State of California. The District expects the team to remain intact, and reserves the right to approve replacements or request changes in project management based on performance.

3. **Proposed Solution Overview (Functionality & Usability)**

- **General Description of Modules and Integration:** Present, in detail, features and capabilities of the proposed application software. Clearly describe the software products or modules included in the proposal that are necessary to meet AVUSD's business requirements, as well as any "value-added" or "optional" modules. Indicate which modules are fully integrated into the main application, what processes are handled in "real-time" versus batch, and how third-party applications (if any) are integrated (e.g., shared security definitions, similar menu structures).
- **User Interface and Help:** Describe the consistency of the user interface, availability of online documentation, and context-sensitive help.
- **Data Customization and Flexibility:** Explain how the system supports establishing new data fields, user control over field types (numeric, date, checkbox, text), field definitions (size), presentation sequence on screen, ability to mark fields as required, and entry of lists of valid values for pop-up selection. Confirm that user-defined fields are available for reporting and that interactive help text can be defined for new data fields.
- **System Capacity:** Confirm the system supports an unlimited number of fields, tables, entries, screens, user-defined reports, students, schools, simultaneous users, registered users, and user groups.
- **Planned Future Development and Roadmap:** Provide a brief description of planned future development and roadmap timeline that may be beneficial to Participants. Acknowledge that this information may be considered confidential and indicate willingness to discuss under a Non-Disclosure Agreement (NDA).

4. **Third-Party Products and Integrated Applications**

- Explicitly state the name of any third-party products that are part of the proposed solution.
- **Contractual Relationship:** For each third-party product, state whether the proposer's contract will encompass the third-party product or if AVUSD will have to contract independently for the product.
- **Source Code and Support:** Provide proof that the proposer has access to the third-party software source code (owned or in escrow) and has the ability to provide long-term support for the third-party software components of its system.
- **Value-Added Components:** Describe any products, features, or other value-added components recommended for use with the proposed system that have not been specifically requested in this RFP.

- **Integrated Systems List:** Provide a comprehensive list of all Learning Management Systems (LMS), Notification Systems, Identity Management Systems, Assessment Systems, Curriculum Providers, Special Education Systems, document management, and/or English Language Learner (ELL) Programs that the proposed Solution is currently integrated with. For each, briefly describe the level of integration and how frequently the Solution can pull/refresh data from these sources. For systems relying on data from the SIS, specify any limitations on the number, frequency, or scope of scheduled extracts.

5. Responses to Functional and Technical Requirements

- Responses to the requirements listed in the District's separate functional and technical requirements appendices must be provided in this section.
- **Answer Key:** Confirm the use of the specified answer key (Y/N/C/F/T/R) with only one code per requirement. Any requirement answered in any other way will be treated as a negative/non-response.
- **Comments and Cross-Referencing:** Provide lengthy comments on particular requirements in a separate spreadsheet, cross-referenced to specific requirement numbers.
- **Contractual Obligation:** Acknowledge that the proposals submitted, including requirement responses, will become attached to the software license and implementation services contract.
- All responses indicating functionality (whether "out-of-the-box," via customization, reporting tool, or third-party product) must have associated costs included in the cost proposal, and the necessary module must be within the scope and cost of this proposal.
- If functionality is planned for a future release, indicate the expected release date and any additional cost.

6. Implementation Plan

- **Detailed Methodology:** Provide a detailed plan for implementing the proposed system, including estimated timeframe, an overview of phases and milestones, key assumptions, and assumed responsibilities for both vendor and district staff.
- **Risk Management:** Describe how the vendor identifies and mitigates potential implementation risks and delays, including comprehensive contingency plans.
- **Transition from Incumbent System:** Describe the vendor's approach and services supporting customer transitions from incumbent student information systems to ensure minimal interruption.
- **Staffing Levels:** Identify the expected IT staffing levels from AVUSD to support the ongoing operations of the proposed system.

7. Data Conversion Plan

- **Process Overview:** Describe the process for designing a data conversion plan to migrate AVUSD's historical data from the legacy Aeries systems, ensuring the integrity and accuracy of that data.
- **Roles and Responsibilities:** Detail the proposer's expectations of the activities that AVUSD personnel and the proposer will be expected to perform with regards to data conversion.
- **Past Experience:** Detail past experience with data conversion, especially the main types of databases and student information systems for which successful conversions have been completed.

- **Conversion Approach:** Describe how the vendor would approach conversion of the main systems and detail the methodology for managing the required conversions.
- **Historical Data Definition:** Clarify the vendor's interpretation of "historical data" (e.g., past course and grade information for current students versus other types of historical data) and identify any potential additional data conversion services needed for data exceeding a certain age or quality.

8. Training Plan

- **Training Strategy:** Provide a detailed plan for training, including an overview of the proposed training plan/strategy, with options for on-site or off-site training services for the core project team, end-users, and technology personnel. Describe whether the approach is train-the-trainer, turn-key, or other.
- **Roles and Responsibilities:**
 - Define the role and responsibility of the software vendor in the design and implementation of the training plan (e.g., development of customized training materials, delivering training).
 - Clearly state the role and responsibility of AVUSD staff in the design and implementation of the training plan.
- **Knowledge Transfer:** Describe the knowledge transfer strategy proposed by the software vendor to prepare AVUSD staff to maintain the system after it is placed into production.
- **Training Details:** Include descriptions of classes/courses and training materials proposed, specifying the unit of measure (e.g., units, classes, days) and defining the hours associated. Be specific about the number of staff that will be directly trained by Vendor personnel, define whether training will be conducted in person, remotely (synchronous), or via on-demand tools, and provide an outline of proposed training content and sample supporting materials.
- **Site Leads/System Administrator Training:** Include a detailed explanation of the training Vendor will provide for site leads/management and system administrators, indicating the functions on which they will be trained.

9. Maintenance and Support Program

- **Post-Implementation Support:** Specify the nature of any post-implementation support (e.g., one month of on-site support after go-live).
- **Support Hours and Emergency Services:** Describe standard support hours (24x7x365 preferred), extended and/or emergency support hours, and criteria or limitations on the availability of emergency or escalated support requests.
- **Service Level Agreements (SLAs):** Provide guaranteed uptime commitments, response and resolution times for different severity levels of incidents (e.g., "regular" and "emergency" services), and processes for issue resolution. Include the severity/type of incident, average response and resolution time for similar incidents over the past two years, and the target and guaranteed response and resolution times.
- **Support Request Process:** Describe the process for submitting support requests, how they are tracked, and how the original requestor as well as centralized Participant support personnel (IT contact and contract administrator) can access support request history.
- **System Updates and Downtime:** Describe the frequency of system updates on an annual basis, whether updates are required or optional, and how Participants are notified. Detail mechanisms to minimize downtime during updates and expected impact

on users.

- **Business Continuity and Termination:** Indicate the provisions for service and support if Vendor's business terminates, is subjected to a strike, or shutdown for any reason.
- **Performance Metrics:** Provide data to show the number of support requests, median response time, and customer satisfaction metrics used to evaluate the responsiveness and effectiveness of the Vendor's support team.
- **Feature Requests and Feedback:** Describe the process for submission, review, escalation, and development for new feature requests. Explain systems in place to capture customer feedback and how that feedback is used to inform Vendor's development and organizational priorities.

10. Acceptance Testing

- Detail the vendor's approach to acceptance testing.
- Explain what criteria were generally used to signify acceptance at previous implementations.
- Describe how each of the following types of testing has been addressed in the implementation plan: (a) module testing; (b) integration testing; and (c) stress/load testing. Also, explain any anticipated parallel testing that will be part of the overall implementation process.

11. Cost Proposal (Schedule of Fees and Charges)

- **Five-Year Cost Estimate:** Submit a five-year cost estimate for all hardware, software licenses, support, training, implementation services, and maintenance for the solution being proposed. Do NOT use "TBD" (to be determined) or similar annotations in the price estimates. All costs for functionality in the proposal must be listed in the pricing forms.
- **Billing Rates and Staffing:** Include hourly billing rates by position (proposed) and a staffing plan (proposed).
- **Reimbursable Schedule:** Provide a reimbursable schedule, noting that travel and related expenses shall be reimbursed in accordance with federal government Joint Travel Regulation.
- **Assumptions and Limitations:** Describe any assumptions made impacting the cost proposal, and any limitations (e.g., length of term, service quantities, professional service hours, number of initial distribution groups) that apply to the listed costs.
- **Pricing Narrative:** Provide a narrative explanation of the pricing proposal. Describe in detail any limitations that apply to the proposed pricing.
- **Growth/Declining Enrollment Impact:** Describe how growth and declining enrollment will impact the price.
- **Payment Milestones:** Confirm that maintenance and licensing fees shall not begin until the Solution has been tested and accepted by the Participant. Describe payment milestones and expectations.
- **Continuation Costs:** Describe if any implementation/training costs apply for Members who are continuing use of the same Solution.
- **Tiered Pricing:** If pricing is different based on the quantity of licenses purchased or any other factors, provide pricing for relevant tiers (e.g., by student ADA count) along with specifications to qualify for each tier.

12. Client References and Past Performance

- Provide information about prior services furnished by your firm in the last ten (10) years

- on a minimum of five (5) K-12 educational projects.
- **Proposed Product Usage:** Explicitly state that at least three (3) of the customer references must be actively using the proposed products or similar solutions for which the vendor is submitting the proposal. Installations should be similar in scope, timeline, and technical design to the Vendor's Proposal for AVUSD.
- **Reference Details:** For each project, list the District name, contact person name, title, telephone number, and email address for reference, project name and location, beginning and end dates of the project, main program elements, original budget, proposal amount, and final amount at close-out.
- **Role Clarity:** Specify the role of the firm or individual if work was not exclusively by the firm (e.g., joint venture, association).
- **Sub-consultants:** List any sub-consultants that worked with the firm on the project.
- **Reference Check Readiness:** Confirm that each reference is willing to participate in a 30 – 45-minute reference check call and inform references that AVUSD will contact them. All contact information must be correct and up to date.
- **Public Records Act Acknowledgment:** Proposer agrees and understands that any client reference information provided in response to this RFP shall not be considered confidential and shall be subject to the California Public Records Act.

13. Exceptions to the RFP

- Clearly identify all exceptions to the RFP content, general expectations, specific requirements, and/or the District's standard Independent Contractor Agreement for Services (Appendix B).
- For each exception, propose acceptable alternative language and/or provide rationale to support the exception.
- Acknowledge that proposed exceptions must be addressed by Vendor and agreed upon by AVUSD during contract negotiations to be effective. Note that AVUSD may elect not to award and/or to revoke award based on requested exceptions that cannot be agreed upon.

14. Sample Documents and Supplementary Materials

- Provide sample copies of the following documents:
 - Sample software licensing agreement.
 - Sample implementation services agreement.
 - Sample standard reports.
 - Sample documentation (user guides, training materials).
 - Service Level and Maintenance Agreement (if applicable), noting that vendor agreements must be incorporated into AVUSD agreements and negotiated after award.
 - Documentation of information security policies and confirmation of compliance with recognized cybersecurity frameworks (e.g., Global Education Security Standard, ISO 27001, SOC 2, FedRAMP, NIST, FISMA, FIPS, WCAG 2.2 AA/2.2).
 - Confirmation that the vendor agrees to execute and abide by all terms in the Standard Student Data Privacy Agreement (CA-NDPA).
 - Any other additional descriptive material that is used in support of any information in the Vendor's proposal must be clearly identified and cross-referenced to the Proposal Form.

G. PROPOSAL EVALUATION AND SELECTION PROCESS

Stage 1: Initial Review and Qualification

Proposals will undergo a two stage evaluation. Initially, responses to the RFP will be reviewed for compliance, responsiveness, responsibility, and proposer qualifications. The District reserves the sole discretion in these determinations. Proposals that do not meet mandatory requirements or are incomplete will not be considered. The District may disqualify any proposer for any reason without explanation and may request written clarifications, incorporating this additional information into the process.

Initial responses will be evaluated and rated based on:

- Information provided in the proposal.
- Information provided in response to District clarification questions.
- Information from reference checks.
- Experience and performance history with similar services.
- Experience and results of proposed personnel.
- Technical capabilities and track record.
- Value of services under proposed fees.
- Overall responsiveness of the proposal.

The quality of responses will be assessed using the following criteria:

- Completeness
- Thoroughness
- Accuracy
- Compliance with proposal instructions
- Suitability of proposed responses

This rubric will be used to evaluate the contents of the proposals:

Criteria	1 - Poor (Does not meet expectations)	2 - Fair (Basic functionality, but lacks ease of use)	3 - Satisfactory (Meets requirements but requires manual workarounds)	4 - Good (Efficient, well-integrated, and mostly automated)	5 - Excellent (Highly efficient, fully automated, intuitive, and user-friendly)
Overall Responsiveness & Compliance	Proposal is significantly incomplete, deviates from instructions, and/or contains many non-responsive sections.	Proposal is missing several required elements or includes information in incorrect formats. Some instructions are not followed.	Proposal generally meets requirements and follows instructions, but may have minor omissions or formatting	Proposal is comprehensive and well-organized, adhering closely to all instructions and requirements.	Proposal is exceptionally complete, accurate, and perfectly organized, exceeding all instructions and requirements.

			issues.		
Completeness & Thoroughness	Key sections are missing or information provided is superficial and lacks detail.	Information is present but often lacks depth or specific examples. Several areas are generic or incomplete.	All required information is present, and most sections are adequately detailed, though some may be less thorough.	All required information is provided with good detail and sufficient examples.	All required information is provided with exceptional detail, comprehensive examples, and clear explanations.
Accuracy	Proposal contains significant factual errors, inconsistencies, or claims that are not supported by evidence.	Proposal contains some inaccuracies or inconsistencies, or claims are not fully substantiated.	Proposal is largely accurate, with only minor or easily correctable inaccuracies.	Proposal is accurate and factual, with claims well-supported.	Proposal is highly accurate, meticulously verified, and free of inconsistencies.
Clarity & Organization	Proposal is difficult to read, poorly organized, and/or contains excessive jargon or unclear language.	Proposal is somewhat organized but can be confusing due to inconsistent formatting or unclear language.	Proposal is generally clear and organized, with logical flow, though some sections could be improved.	Proposal is clear, concise, and well-structured, making it easy to understand and navigate.	Proposal is exceptionally clear, highly concise, and flawlessly organized, demonstrating superior communication.
Suitability of Proposed Responses	Proposed solutions are irrelevant, impractical, or clearly do not address the District's needs.	Proposed solutions are basic or generic, showing limited understanding of the District's specific context or needs.	Proposed solutions generally address the District's needs, but may require significant adaptation or manual effort.	Proposed solutions are well-suited to the District's needs, offering practical and effective approaches.	Proposed solutions are perfectly aligned with the District's needs, demonstrating deep understanding and innovative, highly effective approaches.

Stage 2: Product Demonstrations and Comprehensive Evaluation

Up to three finalists will be selected for comprehensive product demonstrations based on the initial proposal evaluation. These demonstrations are a vital step in the due diligence process for selecting the Student Information System (SIS) that best meets the Apple Valley Unified School District's (AVUSD) needs, ensuring alignment with specific requirements. Vendors will demonstrate their response to specific scenarios and questions outlined in the "RFP Scenarios" document. Presentations will be scored using rubrics in each section of this document. AVUSD intends to award a contract to the respondent whose demonstration best addresses the scenarios and questions.

Areas of Emphasis for Product Demonstrations

Vendors must demonstrate their response to specific scenarios, addressing key questions and evaluation points. Key areas include, but are not limited to:

- **Gradebook Setup, LMS Integration & Report Cards:** Comprehensive gradebook management, seamless LMS integration, efficient report card generation, ability to copy assignments/gradebooks, and automated parent notifications for grades below thresholds.
- **Reports & Query Functionality for Data Analysis:** Capabilities for generating compliance reports with field mapping, retrieving historical data with robust filtering, cross-school data querying, automated report scheduling and notifications, and granular role-based access controls.
- **Security, MFA, Passkeys, and Permission Management:** Explanation of the security framework, multi-factor authentication (MFA), Passkeys, and ability to define granular permissions and restrict data access.
- **API Integration, Data Sync, & Third-Party Compatibility:** Adherence to interoperability standards (e.g., Ed-Fi, One-Roster), processes and tools for district integration (e.g., API), flexibility for scheduled imports/exports, and integrations with LMS, Notification Systems, and Special Education Systems.
- **SIS Customization & Configurable Data Management:** Flexibility to add/modify data fields, adjust presentation sequences, mark fields as required, and manage user-defined lists, ensuring persistence across releases.
- **New Year Process & Student Enrollment Preparation:** System intuitiveness, automation, and customization for new academic year transition, including year definition, pre-enrollment, rollover procedures, and master schedule planning. This involves automated data inconsistency checks and streamlined online registration with secure document upload and address verification.
- **Customer Experience & Vendor Support:** Commitment to customer service, help desk support, Service Level Agreements (SLAs), support request process and tracking, frequency of system updates/patches, and mechanisms to minimize downtime.
- **SIS Training, User Support, & Onboarding Resources:** Recommended implementation training approach (e.g., train-the-trainer), availability of electronic and editable training materials, and detailed training for site leads, management, and system administrators.
- **SIS Conversion & Implementation Plan:** Detailed project timeline, methodology for data migration (including historical data), risk management, allocation of roles and responsibilities, and transition approach from incumbent systems.

- **Mandated Reporting (CALPADS, CRDC, NSLP, Perkins, CTE, etc.):** Capabilities for collecting, validating, and submitting data for state and federal reporting, including features to correct data errors prior to submission. This also covers tracking ELL status, accommodations, and supporting RFEP monitoring.
- **Parent Notifications & Messaging:** Evaluation of notification system for effective family communication, including multi-channel messaging (email, text, phone calls, generated letters, social media integration), automated translations, and message personalization using database fields.

Evaluation Criteria and Scoring Rubrics

Demonstrations will be scored using detailed rubrics within the "RFP Scenarios" document, with the following rating scale for each element:

- **1 – Poor:** Does not meet expectations, lacks functionality.
- **2 – Fair:** Basic functionality, but lacks ease of use.
- **3 – Satisfactory:** Meets requirements but requires manual workarounds.
- **4 – Good:** Efficient, well-integrated, and mostly automated.
- **5 – Excellent:** Highly efficient, fully automated, intuitive, and user-friendly.

Scoring Process:

1. **Assign Scores:** Rate each vendor from 1 to 5 in each category.
2. **Calculate Weighted Scores:** Multiply the category score by its weight.
3. **Sum Total Scores:** Add the weighted scores for the vendor's total score.
4. **Compare with Baseline:** Use Aeries as a baseline for assessing potential improvements.

Additional Selection Criteria for SIS Evaluation (Beyond the core scenarios)

During the demonstration and evaluation process, AVUSD will also consider:

- **Security & Compliance Enhancements:** Data Retention & Purge Policies, Parent & Student Data Requests, and FERPA, HIPAA, & State Compliance Tracking.
- **SIS Reliability, Performance & Disaster Recovery:** SIS Uptime & System Redundancy, Disaster Recovery & Data Backups, and Peak Usage Performance.
- **Advanced Analytics & AI Insights:** Predictive Analytics for At-Risk Students, Real-Time Dashboards for Admin & Teachers, and Automated Early Warning Systems (EWS).

The vendor with the highest overall total weighted score from these demonstrations will be considered to best address AVUSD's needs. These demonstrations will also evaluate company expertise, qualifications, operations, and services deemed to be in the District's best interests.

Stage 3: Post-Demonstration Evaluation and Award

The District may conduct investigations of responding parties beyond identified references and request additional pertinent information. The District reserves the right to investigate and rely upon information from other available sources. At the evaluation committee's discretion, firms may be asked to arrange facility tours.

The District reserves the right to reject any or all submittals, negotiate contract terms with one or more proposers for one or more work items, and award all, part, or none of the work described

in this RFP. Each submittal will be scored by an RFP evaluation committee. The District reserves the right to contract with any entity responding to this RFP for all or any portion of the work, reject any proposal as non-responsive, and/or not contract with any proposer. Participation in the RFP process does not guarantee a contract award or any consideration. The District reserves the right to contract with any firm not participating in this process and will not be responsible for proposal preparation costs.

All warranties made by the Selected Vendor, including their Proposal, this RFP, and any attachments, bulletins, supporting documentation, or addenda, will be incorporated into the Master Agreement and be binding upon the Selected Vendor. Any Vendor-submitted attachments, documents, letters, and materials may be included as part of the Master Agreement and Purchase Agreement. A successful Proposal is not the end of the contractual process; further negotiation over Agreement terms and conditions may be necessary.

H. GENERAL INSTRUCTIONS AND RULES FOR PROPOSERS

This section outlines the overarching guidelines and procedural rules for all Proposers responding to this Request for Proposal.

Proposal Submission Guidelines

- All Proposals shall be submitted on the attached Proposal Form (Appendix A). These instructions prescribe the mandatory Proposal Form and the approach for the development and presentation of Proposal information. Proposal Form instructions must be adhered to, all questions must be answered, and all requested data must be supplied. Vendor response to each of the minimum requirements in this RFP is required. Failure to respond or non-adherence to any minimum requirement in this section may be cause for the Proposal to be rejected.
- **Hard Copies:** Proposers shall submit two (2) hard copies: one (1) paper-bound original and one (1) unbound original.
- **Electronic Copies:** Two (2) electronic copies are required on separate permanent media (e.g., write-protected USB drives) in PDF format.
- **Sealed Envelopes:** Proposals must be enclosed in a sealed envelope clearly bearing the RFP name, RFP number, and the Proposer's name.
- **Delivery:** Submissions must be delivered to the Technology Services Department at 12555 Navajo Rd, Apple Valley, CA 92308.
- **Prohibited Methods:** Proposals or modifications submitted by facsimile or electronic mail transmission will not be accepted.
- **Non-Responsiveness:** Failure to submit information in accordance with these procedures may result in the proposal being considered non-responsive.

Proposal Content Requirements

- **Mandatory Form:** All proposals must be submitted on the attached Proposal Form (Appendix A).
- **Clarity and Organization:** Proposals should be prepared simply, providing a

straightforward and concise description of the Vendor's capabilities to satisfy the RFP requirements. Utmost attention must be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled.

- **Supporting Materials and Appendices:** Additional descriptive materials can be submitted as appendices but must be clearly identified and solely support information within the Proposal Form. Cross-references to the Proposal Form in external materials will not be considered.
- **Exclusion of Marketing Materials:** Brochures, marketing materials, or internal company documentation will not be factored into proposal scoring.
- **Functional/Technical Requirements Answer Key:** For functional/technical requirements, Vendors must use a specific answer key (e.g., Y/N/C/F/T/R) with only one code per requirement. Lengthy comments should be provided in a separate, cross-referenced spreadsheet. These responses will become part of any resulting contract.

Validity of Proposals and Costs

The contents of the Proposal, including technical specifications and software maintenance fees, must remain valid for a minimum of 160 days after the due date. If selected, Proposal pricing will remain valid for the entire contract term, including any extensions.

Cost Inclusion:

All costs for functionality described in the proposal (e.g., "out-of-the-box," customization, reporting tools, third-party products) must be included in the cost proposal. If functionality is anticipated in a future release, identify the expected release date and any additional costs. Unidentified costs will be borne by the Vendor.

Proposal Modification and Withdrawal

- **Modifications:** Changes in or additions to the Proposal, recapitulations of the work proposed, alternative proposals, or any other modification not specifically called for in the contract documents may result in the District's rejection of the Proposal as non-responsive. No oral or telephonic modification will be considered.
- **Withdrawal:** A Proposer may withdraw its Proposal at any time prior to the scheduled closing time by written request, signed by an authorized representative. The Proposer may then submit another Proposal up to the closing date and time.

Costs of Proposal Preparation

The District shall not be responsible for any costs incurred by the Proposer for the preparation of the Proposal or any other costs related to this solicitation.

District's Right to Reject/Negotiate

- The District reserves the right to reject any or all submittals, negotiate contract terms with one or more proposers for one or more work items, and award all, part, or none of the work described in this RFP.
- The District may disqualify any Proposer for any reason without explanation.
- Participation in the RFP process does not guarantee a contract award or any consideration.

The District also reserves the right to contract with any firm not participating in this process.

Understanding of Documents and Conditions

- Each Proposer, by submitting a Proposal, represents that they have read and understand the Contract and Proposal Documents and any related reports and information. No claim of misunderstanding will be considered after executing the Agreement.
- Proposers must familiarize themselves with the work area and local conditions, including site access requirements, as there will not be a site walk for this project.

Questions and Clarifications (RFI Process)

- Questions from Proposers must be submitted via email to bid@avusd.org by the deadline specified in Section D. The District will publish addenda and responses on its website.
- Proposers shall not attempt to contact any member of AVUSD staff or Governing Board to discuss matters related to this RFP during the RFP process and prior to final award.

Addenda

Any changes, additions, deletions, or clarifications to this RFP, including general provisions and specifications, will be made by written addendum. Such addenda will be issued by the District and posted on its website.

Confidentiality and Public Records Act

- Proposals submitted in response to this RFP will become the property of the District and be considered public documents under applicable state law.
- Proposals shall be held confidential by the District and not subject to disclosure under the California Public Records Act until after either: (1) the District and the successful Proposer have completed negotiations and entered into an agreement, or (2) the District has rejected all proposals.
- Vague designations and/or blanket statements regarding entire pages or documents as proprietary are insufficient and will not bind the District to protect the designated matter from disclosure.

I. CONTRACTUAL TERMS AND CONDITIONS

This section outlines the legal and financial terms that will govern any resulting agreement.

Agreement Acknowledgment

Proposers must include one of the specified statements in their Executive Summary (Section F.1) regarding their review of and potential objections to the District's form of Independent Contractor Agreement for Services (Appendix "B").

Indemnification

The successful vendor shall execute an indemnification agreement wherein the Proposer agrees to indemnify, defend, and hold AVUSD harmless from any and all liabilities (including litigation costs and attorney's fees) incurred as a consequence of the agreement, and from any claims or losses due to the Proposer's willful misconduct or negligent performance. By submitting a response, Proposer agrees to be bound by these terms.

Warranties

- Software: The selected software vendor will warrant that the proposed software will conform in all material respects to the requirements and specifications stated in this RFP, and that the content of its proposal accurately reflects the software's capability to satisfy functional/technological requirements. This warranty will be valid for the duration of implementation until final acceptance.
- Implementation Services: A warranty is sought for implementation services (e.g., work products, modifications, system configuration) for a minimum of eighteen months after the final acceptance date of respective modules. The implementation services firm must ensure the implemented software conforms to the requirements warranted by the software vendor.

Contract Term and Termination

- The resulting contract will be for three (3) years, with two (2) options to extend for one-year periods, covering approximately July 1, 2026, through June 30, 2029.
- The District reserves the right to terminate the award or any subsequent agreement with 30 days written notice if performance is unsatisfactory, with the District being the sole judge of performance.
- The agreement may also be cancelled if appropriated funds become unavailable, releasing both parties from obligations without financial penalty.

Subcontractors

- Any subcontractors performing services must be fully listed and detailed in the proposal, including hosting providers (e.g., AWS, Azure).
- The Vendor agrees to bind every subcontractor by the terms and conditions of this RFP and all resulting agreements.
- The Vendor shall be fully responsible to the Participant for acts and omissions of its subcontractors. No contractual relation is created between the subcontractor and the District.

Compliance and Certifications

- The Vendor certifies compliance with the Civil Rights Act of 1964 and all applicable Federal and State laws and regulations relating to equal employment opportunity.
- The Vendor must provide Workers' Compensation, Drug-Free Workplace, Tobacco Use Policy, and Criminal Records Check certifications.
- The Solution must meet WCAG 2.2 AA requirements and ensure access to individuals with disabilities. All Products provided shall comply with applicable rules of the Web Content Accessibility Guidelines ("WCAG2").

Data Privacy and Security

- The Vendor agrees to execute and abide by all terms in the Standard Student Data Privacy Agreement CA-NDPA (CA-NDPA).
- Data housed in the Solution remains the sole property of Participant and cannot be used in any way not explicitly approved by Participant.
- No third-party shall be given access to Participant data for any reason without explicit, written authorization from the Participant.

- Proposers must explain internal Vendor company protocols regarding the handling of client data, including security measures (physical and technological).

Order of Precedence

In the event of any conflict or inconsistency among the documents, the order of precedence shall be: (1) the Master Agreement (MA); (2) any exhibit, schedule, or addendum to the MA; (3) the NDPA (with first precedence for student data privacy and security); (4) the body of the Purchase Agreement (PA) template; (5) Vendor's Proposal; and (6) the RFP.

J. PROJECT IMPLEMENTATION AND DELIVERABLES

This section details the District's expectations regarding the implementation of the SIS and the ongoing operational aspects of the solution.

Project Goals and Scope

The new SIS should replace the current system (Aeries), provide complete integration between student, teacher, and financial processes, increase information analysis capabilities, eliminate duplicate effort, allow easy development and delivery of Federal and State of California reports, provide modern processing capabilities (drilldown, audit trail, workflow approvals), ensure a consistent user interface, online documentation, and context-sensitive help, and establish a foundation for integrating new systems in the future.

AVUSD aims for a "vanilla" software package with minimal modifications.

Implementation Timeline and Milestones

The District's goal is to achieve "go-live" status by July 2026, with installation and implementation completed on or before August 1, 2026.

Proposers must provide a general project plan including essential tasks/milestones and the estimated timeline for implementation. This plan should address any assumptions or constraints impacting the timeline.

Data Conversion and Migration

- Proposers must describe the process for designing a data conversion plan to migrate AVUSD's historical data from the legacy Aeries systems, ensuring data integrity and accuracy. This includes past course and grade information for current students.
- The proposal should detail data cleansing, conversion, validation, and auditing services.

Training Plan

- AVUSD is interested in utilizing a "train the trainer" model with vendor support.
- The plan must include an overview of the strategy, options for on-site or off-site training, and target audiences (core project team, end-users, technology personnel).
- Proposers must specify the number of staff directly trained, modalities (in-person, remote synchronous, on-demand), and provide an outline of proposed training content and sample materials.

- Detailed explanation of training for site leads/management and system administrators should be provided, indicating functions like configuration tables, role-based security, complex workflows, and ad-hoc reporting.

Post-Implementation Support and Maintenance

- Proposers must specify the nature of post-implementation and ongoing support, including telephone support (toll-free, hours of operation, 24x7 availability) and problem reporting/resolution procedures.
- Provide response and resolution times to tickets/reported incidents, including severity/type of incident, average times over the past two years, and target/guaranteed times.
- Describe how support requests are submitted and tracked, and how original requestors and centralized support personnel can access history.

System Updates and Enhancements

- Describe the vendor's process for testing and releasing software updates and providing for business continuity during major upgrades.
- Indicate the typical frequency of software updates annually and how Participants are notified.
- Address whether the vendor offers options to rollback problematic updates and what version control mechanisms are in place.

Reporting and Data Access

- Describe how the Solution supports Participants' full access to extract user-generated, system, and usage data.
- Provide a list of standard reports available with descriptions. Describe additional report/query capabilities beyond standard reports.
- Detail support for scheduling routine/recurring reports for delivery to specified user groups.
- Describe interactive features in reporting tools (e.g., dynamic sort, filter).

State and Federal Reporting

- Provide a general overview of State and Federal Reporting features.
- Describe how the Solution supports data validation for state and federal reporting prior to file submission.
- Detail how the vendor maintains adherence to the latest CALPADS Data Guide and CRDC specifications, including evaluation of changes, prioritization, implementation, communication, and support.

Integrations and Interoperability

- Provide a list of all Learning Management Systems (LMS), Notification Systems, Identity Management Systems, Assessment Systems, Curriculum Providers, Special Education Systems, document management, and English Language Learner Programs (ELL) with which the Solution is currently integrated. Describe the level and frequency of data pulls/refreshes.
- Explain the process and tools (e.g., API) available for Participants to integrate the Solution with other data systems.
- Describe whether the Solution adheres to common standards (e.g., Ed-Fi, One-Roster) or leverages third-party options (e.g., Clever, Classlink).

Customization and Configuration

- Describe the flexibility to add/modify data fields, adjust presentation sequences, mark fields as required, and manage user-defined lists.
- Detail full user control over creating district-specific modules with diverse custom fields and secure role-based access.
- Explain modification of existing SIS modules with mechanisms for preserving historical data integrity.

New Year Process and Enrollment

- Describe system intuitiveness, automation, and customization for new academic year transition, including year definition, pre-enrollment, rollover procedures, and master schedule planning.
- This includes automated data inconsistency checks and streamlined online registration with secure document upload and address verification.

Security and Access Management

- Proposers must provide an explanation of the security framework, multi-factor authentication (MFA), Passkeys, and the ability to define granular permissions and restrict data access.
- Describe how the Solution prevents users from accessing information on students they are not directly involved with.

Notification System

- Provide a general overview of the Notification System, including its core features and points of integration with the Student Information System.
- Describe the capabilities to personalize messages to families based on database fields (e.g., incorporating student ID or teacher name).
- Detail features supporting efficient and reliable delivery (e.g., multi-channel messaging, automated translations).

Future Development and Roadmap

- Provide a brief description of planned future development and roadmap timeline that may be beneficial to Participants.

K. PRICING AND FINANCIAL CONSIDERATIONS

This section specifies the required format and content for the financial proposal.

Comprehensive Cost Proposal

- Proposers must submit a five-year cost estimate for all hardware, software licenses, support, training, implementation services, and maintenance for the proposed solution.
- This includes taxes and surcharges, and costs of optional services and products. Taxes may be listed as an approximate percentage.
- All costs for functionality in the proposal must be listed in the pricing forms.
- Costs not identified by Vendor shall be borne by the Vendor and will not alter the requirements identified in this solicitation.
- Describe any assumptions made impacting the cost proposal and any limitations (e.g.,

professional service hours) that apply to the listed costs.

Pricing Model and Tiers

- Provide a narrative explanation of the pricing proposal, detailing any limitations (e.g., length of term, service quantities).
- If pricing is contingent upon specific volume (students/staff) or minimum purchase price, these conditions must be explicitly stated, along with specifications for each tier.

Refund for Downtime

- Confirm that if the Solution is down or performance degraded for longer than 30 minutes (outside scheduled maintenance), the Vendor shall refund the portion of the contract equivalent to that outage window.

Payment Milestones

- Describe payment milestones and expectations. The maintenance and licensing fee shall not begin until the Solution has been tested and accepted by the Participant.

Travel and Expenses

- Clarify if travel and related expenses are included or billed separately.

L. REQUIRED FORMS AND APPENDICES

This section provides a clear checklist and instructions for all documents to be submitted as part of the Proposal.

- Proposal Form (Appendix A)
- Specific Required Forms (Appendix B)
 - Proposal Submission Checklist
 - Master Agreement & Purchase Agreement Confirmation
 - Acknowledgment of Amendments to RFP
 - Vendor Representation and Certification
 - Noncollusion Declaration
 - Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters
 - Certification on Restrictions on Lobbying
 - Worker's Compensation Certificate (Appendix C)
 - Drug-Free Workplace
 - Tobacco Use Policy
 - Criminal Records Check Certification by Vendor
 - Disclosure of Proposal
 - W-9
 - Insurance Requirements Acknowledgement
 - Minimum Price Guarantee Acknowledgment
 - Administrative Fee Acknowledgment
 - Rules Acknowledgment
- Pricing Form (Appendix D)
- Service Level and Maintenance Agreement (Appendix E)
- Sample Reports and Training Materials
- Standard Student Data Privacy Agreement (CA-NDPA Standard) (Appendix F)

- Staff Loading Matrix
- Detailed Cost Estimates
- Functional and Technical Requirements Responses
- Supplementary Product Information
- Exceptions to the RFP

M. COMMUNICATIONS AND CONTACT

This section details the official channels and protocols for communication during the RFP process.

Designated Contact

All correspondence related to the RFP must be directed to the designated AVUSD RFP contact at bid@avusd.org.

Prohibited Communications

No Vendor should attempt to contact or obtain information regarding this RFP from any other AVUSD representative. Discussions about the RFP are strictly limited to the RFI process.

Official Communications

All official records, amendments, changes, updates, revisions, and uploaded documents will be posted on the AVUSD website: <https://bit.ly/AVUSDBids>.

It is the Vendor's responsibility to monitor the website for these updates.

N. LEGAL AND COMPLIANCE REQUIREMENTS

This section highlights key legal and compliance obligations for the selected vendor.

Compliance with Laws

The Vendor agrees to comply with all federal, state, and local laws, rules, regulations, and ordinances that are now or may in the future become applicable to the Vendor, its business, the Products, equipment, and personnel engaged in services.

Non-Discriminatory Employment

The Proposer and any permitted subcontractor shall not unlawfully discriminate against any individual based on race, color, religion, nationality, sex, sexual orientation, age or condition of disability.

Covenant Against Gratuities

The Vendor warrants that no gratuities (entertainment, gifts, etc.) were offered or given to any officer or employee of AVUSD with a view toward securing the contract or favorable treatment. Breach of this warranty gives AVUSD the right to terminate the contract.

Financial Security

As a condition of entry into any agreement, the District reserves the right to demand financial security for performance, including a performance bond, insurance policy, or other reasonable security.

Prevailing Wages

The Vendor, when required by law and at the request of Participant, shall pay prevailing wages.

Data Ownership

The Vendor agrees that, even if the proposed Solution is hosted by the Vendor, data housed in the Solution remains the sole property of the Participant.

False and Misleading Statements

A Proposal containing false or misleading statements, or providing references that do not support contended attributes, may be rejected if intended to mislead the District.

2. PROJECT SPECIFICATIONS

This section outlines the detailed requirements for the proposed Student Information System (SIS). Proposers must refer to Section H for all general proposal instructions and formatting guidelines, and Section F for the required content and structure of their proposal.

A. VENDOR SUPPORT AND ABILITY TO PERFORM

This section requires detailed information regarding the Vendor's operational capacity, experience, and commitment to support for the proposed Solution.

1. Vendor Background and Qualifications:

- Provide a brief description of the Vendor's firm(s), including:
 - History of the firm, its age, number of employees, organizational structure, length of time in the industry, and number of office locations.
 - A brief overview of the Vendor's technical experience, qualifications, and background in providing and maintaining the Solution and related services for K-12 education and/or government customers.
 - Include specific examples of recently completed K-12 or government projects similar in size, scope, and timeline to this project, evidencing awareness of and support for the unique needs of education clients.

2. Subcontractors:

- List any subcontractors performing services against this agreement, including hosting providers such as AWS and Azure.
- For each proposed subcontractor, include:
 - Firm Name, Address, and Management Contact Person.
 - A complete description of the work to be subcontracted.
 - Descriptive information concerning the subcontractor's organization and abilities.
- Confirm that the Vendor agrees to bind every subcontractor by the terms and conditions of this RFP and all resulting agreements.

3. References:

- Provide customer references for at least five (5) K-12, postsecondary education, or government organizations currently serviced by the Vendor.
- At least three (3) of the references must be using the proposed products, and

installations should be similar in scope, timeline, and technical design to the Vendor's Proposal for AVUSD.

- For each reference, include: Organization/Customer Name, Name/Title/Contact information for the customer contact, Organization/Customer Size (number of employees/students/licenses), Implementation length (from contract execution to full implementation), Installation Date, Description of system (including number of locations), and Vendor Project Manager.
- Confirm that each reference is willing to participate in a 30-45 minute reference check call and that they have been informed AVUSD will contact them.

4. Implementation Plan:

- Provide a general project plan that includes implementation of the proposed Solution, detailing:
 - A general outline of essential tasks/milestones and the estimated timeline for implementation.
 - The proposed project approach, including the roles and responsibilities of project team members, required tasks, and any necessary onsite work.
 - A detailed list of Participant (AVUSD) and Vendor responsibilities during the implementation process.
- Describe any assumptions or constraints impacting the Vendor's project timeline, including if any feature or component of the Solution will be phased in on a later timeline (e.g., historical data importing).
- Describe the Vendor's approach and services supporting customer transitions from incumbent Student Information Systems to ensure minimal interruption, and confirm coordination with previous vendors.
- Confirm that the Solution can transfer student and personnel data from the Participants' incumbent system(s) to the new Solution. List any limitations or assumptions that would impact data migration.
- Describe the Vendor's data integration and loading process, including details on data integrity and readiness, as well as providing sample file layouts.

5. Training, User Support, & Onboarding Resources:

- Provide an overview of the recommended implementation training approach. Describe whether Vendor approaches training through a train-the-trainer approach, turn-key implementation, or other strategy.
- Be specific about the number of staff that will be directly trained by Vendor personnel under the proposal.
- Define whether training will be conducted in person, remotely (synchronous) or via on-demand tools.
- Provide an outline of the proposed training content and sample supporting materials, including electronic, editable copies of training materials and suggestions for use and best practices.
- Include a detailed explanation of the training Vendor will provide for site leads/management and system administrators, indicating on which functions the system administrator will be trained.

6. Customer Experience and Vendor Support:

- Describe standard support hours (24x7x365 preferred) and extended and/or emergency support hours. If standard support is not available 24x7x365, describe criteria used and/or limitations on the availability of emergency or escalated support

- requests.
- Provide response and resolution times to tickets/reported incidents. Include the severity/type of incident, the average response and resolution time for similar incidents over the past two years, and the target and guaranteed response and resolution times included in Vendor's proposal.
- Describe the process for submitting support requests, how they are tracked, and how the original requestor as well as centralized Participant support personnel can access support request history.
- Confirm that the Vendor will provide full-time, company-employed customer service professionals who are trained specifically to support the products and configuration recommended for Participant. Describe the size, work location, and organizational structure of the support team.
- Confirm that the Vendor will appoint one point-of-contact for each Participant to act as a company liaison and point of escalation for support and/or platform issues.
- Describe systems in place to capture customer feedback and how that feedback is used to inform Vendor's development and organizational priorities.

B. TECHNOLOGY REQUIREMENTS

This section covers the technical aspects and infrastructure supporting the proposed Solution.

1. General System and Architecture:

- Confirm that the Solution shall be designed to anticipate and provide for increases in data storage needs, increasing size and scope of data sets on-line, and increasing number of users.
- Confirm that software updates are included in the maintenance contract.
- Confirm that the Solution and all Vendor-supplied content meet WCAG 2.2 AA requirements and ensures access to individuals with disabilities.
- Specify whether the Solution is Vendor-hosted (web/cloud-based) or Participant-hosted (on-premise). If both options are offered, explain differences in features and/or access to data. If on-premise, provide all technical documentation including minimum requirements, database sizing recommendations, and Solution architecture and installation.
- Provide details regarding Vendor needs and expectations for remote access to systems and open ports required for communication and data exchange between system components.
- Describe the Vendor's process for testing and releasing software updates, and providing for business continuity during major upgrades. Describe expectations of Participant staff to apply upgrades for the Solution.

2. Performance and Reliability:

- State uptime for the Solution for the past three (3) years. Scheduled maintenance that renders the Solution unavailable for typical usage should be counted as an outage. Define uptime commitments included in the Vendor's service level agreement.
- Provide a list of any site-wide outages or incidents/issues over the past two years that significantly degraded performance (application responsiveness, accessibility, or feature availability) for Vendor-hosted customers, including duration and impact.
- Describe any data loss or data corruption that occurred in the past three (3) years. Identify any customers that experienced lost or compromised data and the source of the issue.

- Describe Vendor support for disaster recovery of the complete Solution in the instance of data corruption, complete data failure, complete server failure, or complete site failure. Provide evidence of comprehensive disaster recovery planning.
- 3. Data and Interoperability:**
- Describe how the Vendor’s proposed Solution supports Participants’ full access to extract their user-generated, system, and usage data.
 - Specify which platforms the Vendor’s proposed Solution integrates with for authentication/authorization (e.g. Google Single Sign On).
 - Provide a list of all Learning Management Systems (“LMS”), Notification Systems, Identity Management Systems, Assessment Systems, Curriculum Providers, Special Education Systems, document management, and/or English Language Learner Programs (“ELL”) that the Vendor’s proposed Solution is currently integrated with. For each, briefly describe the level of integration and how frequently the Solution can pull/refresh data from these data sources.
 - Describe the Vendor’s data integration and loading process, and include sample file layouts.
 - Describe the capabilities of the Solution to provide bulk imports and exports.
 - Describe whether the Solution adheres to common standards (e.g., Ed-Fi, One-Roster) and/or leverages third-party integration options (e.g., Clever, Classlink) to improve interoperability.
- 4. Security:**
- Confirm that the Vendor’s information security policies are documented and available to clients upon request.
 - Confirm that the Solution prevents users from accessing information on students that they are not directly involved with.
 - Provide a description of the Vendor’s policy regarding storage, retention, and distribution of data. State Vendor data non-release policy.
 - Explain internal Vendor company protocols regarding the handling of client data.
 - Describe the security measures (physical and technological) taken to protect data.
 - Confirm that Vendor agrees to execute and abide by all terms in the Standard Student Data Privacy Agreement CA-NDPA (included in Appendix F of the AVUSD RFP).
 - If applicable, provide information about the scope of any recent data breaches and remediation efforts.

C. FUNCTIONALITY AND USABILITY (MODULE-SPECIFIC)

This section should include an in-depth description of the Student Information System’s functionality. Vendors may respond and be awarded to one or more system modules, and are not required to respond to all modules.

For each module, indicate whether the module is included in the proposal (Y/N), whether it may be licensed individually (Y/N), and whether it is package-only (Y/N). If package-only, list applications that must be bundled with the purchase.

For each requirement within the modules, Vendors must use one code only:

- Y: Yes, the software provides this functionality.
- N: No, the software does not provide this functionality.
- C: The software can be Customized via software modification to provide this functionality.

- Provide cost estimate in the “Comments” section.
- F: Functionality will be available in a future release. Provide anticipated release number (version) and date in the “Comments” section.
- T: Third Party Software required to fully provide requirement.
- R: Provided with reporting tool.

Any requirement answered in any other way will be treated as a negative/non-response. Lengthy comments should be provided in a separate, cross-referenced spreadsheet. For any feature not included as part of the base Solution but offered as an additional feature with an additional cost, make a note in the Proposal and include the cost in Appendix D.

1. General SIS Features:

- Confirm that the Solution supports the setup of standard district information (name, state number, phone, URL, address, county) and specific school information (name, state number, phone, fax, email, address).
- Describe how the Solution is designed to optimize user experience (minimize clicks, provide intuitive navigation, support efficient data entry).
- Describe what grade levels and/or educational levels are supported by the Solution (e.g., PreK, TK, K-12th grade), including details on state reporting features specific to these levels.
- Provide an overview of how school calendars are maintained and updated within the Solution.
- Provide a brief description of planned future development and roadmap timeline that may be beneficial to Participants.

2. Scheduling & Master Schedule Creation:

- Provide an overview of the Solution’s features related to managing a course catalog (list of approved/available courses).
- Provide a summary of the Solution’s features related to scheduling students into course sections (master scheduling).
- Describe how the Solution supports secondary school (grades 7-12) students in building a multi-year course-request plan aligned to graduation requirements.
- Describe features of the solution designed to create efficiencies for managing/populating section enrollments and addressing excess demand.
- Provide the Vendor’s scheduling manual/documentation as a separate attachment/document to the proposal, noting that this will be considered confidential and proprietary.

3. Behavior:

- Provide an overview of the Solution’s features related to tracking behavioral concerns and discipline incidents.
- List all attributes tracked for each disciplinary incident.
- Describe how the Solution manages information related to student suspensions and expulsions, including start/end dates, eligibility to return to school, type, and cause.

4. Health:

- Describe how the Solution manages comprehensive health information, including options for customizing medical notes, medications, office visits, screenings, waivers, and treatments.
- Explain how the Solution supports dynamic immunization record tracking and reporting, including compliance status and detailed reports.

5. **Testing and Assessment:**

- Describe how the Solution manages and displays test scores across various levels of granularity (test level, sub-test level, strand level, and sub-strand level).
- Explain how the Solution accommodates multiple types of test scores (e.g., scale scores, raw scores, percentile scores, percentage scores, curve equivalent scores, and pass/fail scores).
- Explain how the Solution captures and manages detailed information related to assessments and assessment administrations (test name, date, year, grade level, number of items, test type, and any special accommodations).
- Confirm whether the Solution offers a full-featured assessment product as part of the SIS.

6. **Reports, Queries, and Searches:**

- Provide a list of standard reports available in the system with descriptions.
- Describe additional report/query capabilities beyond the available standard reports.
- Describe how the Solution supports scheduling routine/recurring reports for delivery to specified user groups.
- Describe interactive features built into the Solution's reporting tools designed to make available reports/queries more flexible (e.g., dynamically sort, filter, group, drill-down).
- Describe advanced reporting capabilities in the Solution, including enhanced design elements, business intelligence and dashboarding tools, natural-language/inquiry-based reporting, and data governance tools.

7. **State and Federal Reporting:**

- Provide a general overview of the Solution's State and Federal Reporting features.
- Describe how the Solution supports data validation for state and federal reporting prior to file submission.
- Describe how the Vendor maintains the Solution to ensure it adheres to the latest CALPADS and CRDC Data Guide specifications.
- To what extent can the Solution be customized to meet the specific CALPADS and CRDC reporting needs of districts/LEA? How does the Solution handle unique Participant-specific data elements that may need to be reported for CALPADS or CRDC?
- Describe security measures integrated within the Solution to protect sensitive information during the CRDC reporting process.

8. **Special Education:**

- Provide an overview of the features of the Special Education module included in the Solution.
- Describe the extent to which users can customize special education data fields to meet program needs.
- Describe how special education services are individually tracked, including details such as service start and end dates, location, provider, and frequency.
- List and describe any integrations with other 3rd party Special Education systems (e.g., SEIS) which the Solution supports.

9. **English Language Learners (ELL):**

- Describe how the Solution records the language of instruction in compliance with CALPADS requirements.
- Describe how the Solution manages and displays the expected exit date for ELLs.

- Describe any workflows or process automation available in the Solution to support procedures related to identification, assessment, support, and reclassification of ELL students.
- Describe security measures integrated within the Solution to protect sensitive ELL data.
- Describe standard ELL Reports available in the Solution and explain the degree to which ELL Reports can be customized or created to meet specific customer program needs.

10. Notification System:

- Provide a general overview of the Notification System, including its core features and points of integration with the Student Information System.
- Describe the pricing model for the Notification System (standalone, included, or optional add-on).
- Describe how parents can indicate their preferred notification language and list languages available in the Solution.
- Provide a brief description of planned future development and roadmap timeline for the Notification System that may be beneficial to Participants.

D. PRICE

This section requires a detailed breakdown of all costs associated with the proposed Solution.

1. Pricing Forms:

- Complete the Pricing Forms (appendix D) detailing all costs associated with the proposed Solution, including, but not limited to, implementation, software licensing and maintenance, training, ongoing support, recommended professional services, taxes and surcharges, and costs of optional services and products.
- Confirm that all costs have been included.
- Confirm that the Pricing Form includes an itemized schedule of all equipment and software for the proposed Solution and that all pricing quoted includes all activities necessary for a complete, turn-key system.

2. Pricing Assumptions and Limitations:

- Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours, number of initial distribution groups) that apply to the listed costs.
- Provide a narrative explanation of the pricing proposal. Describe in detail any limitations that apply to the proposed pricing (e.g., length of term, service quantities).
- If pricing is contingent upon a specific volume of students or staff or minimum purchase price, explicitly state those conditions.
- Describe how growth and declining enrollment and site changes will impact the price.

E. EXCEPTIONS

This section is for detailing any deviations from the RFP's terms and conditions.

1. Exceptions to RFP Content:

- Describe any exceptions to the RFP content, general expectations, specific requirements, and/or the AVUSD's standard Master Agreement and Purchase Agreement.
- For each exception, propose acceptable alternative language and/or provide rationale

to support the exception.

APPENDIX “A”: PROPOSAL FORM

Instructions:

- Write out all answers using this Proposal Form.
- Additional material may be submitted as appendices but must be clearly identified and solely support information within the Proposal Form. Cross-references to the Proposal Form in external materials will not be considered responsive.
- No brochures, marketing materials, or internal company documentation will be considered when scoring Proposals.
- Proposals should be prepared simply, providing a straightforward and concise description of the Vendor's capabilities to satisfy the RFP requirements. Utmost attention must be given to accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled.
- For functional/technical requirements, Vendors must use the specific answer key provided in each section. Lengthy comments should be provided in a separate, cross-referenced spreadsheet. These responses will become part of any resulting contract.
- All costs for functionality described in the proposal (e.g., "out-of-the-box," customization, reporting tools, third-party products) must be included in the cost proposal (appendix D). If functionality is anticipated in a future release, identify the expected release date and any additional costs. Unidentified costs will be borne by the Vendor.
- The proposal's contents, including technical specifications and software maintenance fees, must remain valid for a minimum of 160 days after the due date. If selected, proposal pricing will remain valid for the entire contract term, including extensions.
- Failure to respond or non-adherence to any minimum requirement may be cause for the Proposal to be rejected.

Contractor Information

Firm/Contractor Name:	
Primary Contact Name:	
Contact Title:	
Contact Email:	
Contact Phone:	

Part 1: Vendor Support and Ability to Perform

1.1 Vendor Background and Qualifications

Provide a brief description of the Vendor's firm(s), including:

- History of the firm, its age, number of employees, organizational structure, length of time in the industry, and number of office locations.

- A brief overview of the Vendor’s technical experience, qualifications, and background in providing and maintaining the Solution and related services for K-12 education and/or government customers.
- Include specific examples of recently completed K-12 or government projects similar in size, scope, and timeline to this project, evidencing awareness of and support for the unique needs of education clients.

Response:

1.2 Subcontractors

List any subcontractors performing services against this agreement, including hosting providers such as AWS and Azure. For each proposed subcontractor, include:

- Firm Name, Address, and Management Contact Person.
- A complete description of the work to be subcontracted.
- Descriptive information concerning the subcontractor’s organization and abilities.
- Confirm that the Vendor agrees to bind every subcontractor by the terms and conditions of this RFP and all resulting agreements.

Response:

1.3 References

Provide customer references for at least five (5) K-12, postsecondary education, or government organizations currently serviced by the Vendor. At least three (3) of the references must be using the proposed products, and installations should be similar in scope, timeline, and technical design to the Vendor’s Proposal for AVUSD. For each reference, include:

- Organization/Customer Name
- Name/Title/Contact information for the customer contact
- Organization/Customer Size (number of employees/students/licenses)
- Implementation length (from contract execution to full implementation)
- Installation Date
- Description of system (including number of locations)
- Vendor Project Manager
- Confirm that each reference is willing to participate in a 30-45 minute reference check call and that they have been informed AVUSD will contact them.

Response:

1.4 Implementation Plan

- Provide a general project plan that includes implementation of the proposed Solution, detailing a general outline of essential tasks/milestones and the estimated timeline.
- Describe the proposed project approach, including the roles and responsibilities of project team members, required tasks, and any necessary onsite work.
- Provide a detailed list of Participant (AVUSD) and Vendor responsibilities during the implementation process.
- Describe any assumptions or constraints impacting the Vendor’s project timeline, including if any feature or component of the Solution will be phased in on a later timeline.
- Describe the Vendor’s approach and services supporting customer transitions from

incumbent Student Information Systems to ensure minimal interruption, and confirm coordination with previous vendors.

- Confirm that the Solution can transfer student and personnel data from the Participants' incumbent system(s) to the new Solution. List any limitations or assumptions that would impact data migration.
- Describe the Vendor's data integration and loading process, including details on data integrity and readiness, as well as providing sample file layouts.

Response:

1.5 Training, User Support, & Onboarding Resources

- Provide an overview of the recommended implementation training approach (e.g., train-the-trainer, turn-key, etc.).
- Be specific about the number of staff that will be directly trained by Vendor personnel under the proposal.
- Define whether training will be conducted in person, remotely (synchronous) or via on-demand tools.
- Provide an outline of the proposed training content and sample supporting materials, including electronic, editable copies.
- Include a detailed explanation of the training Vendor will provide for site leads/management and system administrators.

Response:

1.6 Customer Experience and Vendor Support

- Describe standard support hours (24x7x365 preferred) and extended and/or emergency support hours.
- Provide response and resolution times to tickets/reported incidents, including severity/type, average times over the past two years, and target/guaranteed times.
- Describe the process for submitting and tracking support requests.
- Confirm that the Vendor will provide full-time, company-employed customer service professionals. Describe the support team's size, location, and structure.
- Confirm that the Vendor will appoint one point-of-contact for each Participant.
- Describe systems in place to capture and act on customer feedback.

Response:

Part 2: Technology Requirements

2.1 General System and Architecture

- Confirm that the Solution is designed for increases in data storage, data sets, and users.
- Confirm that software updates are included in the maintenance contract.
- Confirm that the Solution meets WCAG 2.2 AA requirements.
- Specify whether the Solution is Vendor-hosted or Participant-hosted. If on-premise, provide all technical documentation.
- Provide details regarding Vendor needs for remote access and open ports.
- Describe the process for testing and releasing software updates and ensuring business

continuity.

Response:

2.2 Performance and Reliability

- State uptime for the Solution for the past three (3) years. Define uptime commitments.
- Provide a list of any site-wide outages or significant performance degradation incidents over the past two years.
- Describe any data loss or data corruption that occurred in the past three (3) years.
- Describe Vendor support for disaster recovery and provide evidence of comprehensive planning.

Response:

2.3 Data and Interoperability

- Describe how the Solution supports full access to extract all user-generated, system, and usage data.
- Specify which platforms the Solution integrates with for authentication/authorization (e.g., Active Directory, Google SSO).
- Provide a list of all current integrations (LMS, Notification Systems, etc.), describing the level of integration and data refresh frequency.
- Describe the data integration and loading process, including sample file layouts.
- Describe capabilities for bulk imports and exports.
- Describe adherence to common standards (e.g., Ed-Fi, One-Roster) and/or use of third-party options (e.g., Clever, Classlink).

Response:

2.4 Security

- Confirm information security policies are documented and available.
- Confirm the Solution prevents users from accessing information on students they are not directly involved with.
- Describe the policy regarding storage, retention, and distribution of data.
- Explain internal protocols regarding the handling of client data.
- Describe the security measures (physical and technological) taken to protect data.
- Confirm agreement to execute and abide by the Standard Student Data Privacy Agreement CA-NDPA (Appendix F).
- If applicable, provide information about any recent data breaches and remediation efforts.

Response:

Part 3: Functionality and Usability

Instructions: For each requirement, Vendors must use one code only:

- Y: Yes, the software provides this functionality.
- N: No, the software does not provide this functionality.
- C: The software can be Customized via software modification. Provide a cost estimate in

the “Comments” section.

- F: Functionality will be available in a future release. Provide the anticipated release number and date in the “Comments” section.
- T: Third Party Software is required.
- R: Provided with a reporting tool.

Module Availability

For each module, indicate whether it is included in the proposal (Y/N), can be licensed individually (Y/N), and if it is package-only (Y/N). If package-only, list applications that must be bundled.

Module	Included (Y/N)	Individual (Y/N)	Package-Only (Y/N)	Comments
General SIS Features				
Scheduling & Master Schedule				
Behavior				
Health				
Testing and Assessment				
Reports, Queries, Searches				
State and Federal Reporting				
Special Education				
English Language Learners (ELL)				
Notification System				

3.1 General SIS Features

Requirement	Response	Comments
Supports setup of standard district and school information.		
Designed to optimize user experience (intuitive navigation, etc.).		
Supports all required grade levels (PreK, K-12, adult ed).		
School calendars are maintained and updated within the solution.		
<i>Provide a brief description of planned future development and roadmap.</i>		

3.2 Scheduling & Master Schedule Creation

Requirement	Response	Comments
Manages a district/school course catalog.		
Schedules students into course sections (master scheduling).		
Supports multi-year course-request plan aligned to grad requirements.		
Features to create efficiencies for managing section enrollments.		
<i>Provide scheduling manual/documentation as a separate attachment.</i>		

3.3 Behavior

Requirement	Response	Comments
Tracks behavioral concerns and discipline incidents.		
Lists all attributes tracked for each disciplinary incident.		
Manages student suspensions and expulsions information.		

3.4 Health

Requirement	Response	Comments
Manages comprehensive health info (notes, meds, visits, etc.).		
Supports dynamic immunization record tracking and reporting.		

3.5 Testing and Assessment

Requirement	Response	Comments
Manages and displays test scores at multiple levels of granularity.		
Accommodates multiple types of test scores (raw, percentile, etc.).		
Captures detailed information related to assessments.		
Offers a full-featured assessment product as part of the SIS.		

3.6 Reports, Queries, and Searches

Requirement	Response	Comments
Provides a list of standard reports with descriptions.		
Offers additional report/query capabilities beyond standard reports.		
Supports scheduling of routine/recurring reports.		
Reporting tools include interactive features (sort, filter, drill-down).		
Includes advanced reporting capabilities (dashboards, BI tools, etc.).		

3.7 State and Federal Reporting

Requirement	Response	Comments
Provides State and Federal Reporting features.		
Supports data validation prior to file submission.		
Adheres to the latest CALPADS and CRDC Data Guide specs.		
Can be customized for specific CALPADS/CRDC reporting needs.		
Includes security measures to protect sensitive CRDC data.		

3.8 Special Education

Requirement	Response	Comments

Includes a Special Education module.		
Users can customize special education data fields.		
Special education services are individually tracked.		
Integrates with other 3rd party Special Education systems (e.g., SEIS).		

3.9 English Language Learners (ELL)

Requirement	Response	Comments
Records language of instruction per CALPADS requirements.		
Manages and displays the expected exit date for ELLs.		
Includes workflows/automation for ELL student procedures.		
Includes security measures to protect sensitive ELL data.		
Provides customizable standard ELL Reports.		

3.10 Notification System

Requirement	Response	Comments
Provides a general overview of the Notification System.		
Describes the pricing model for the Notification System.		
Parents can indicate preferred		

notification language.		
<i>Provide a brief description of the roadmap for the Notification System.</i>		

Part 4: Price

Instructions: Complete the Pricing Forms (appendix D) detailing all costs associated with the proposed Solution. Confirm that all pricing quoted includes all activities necessary for a complete, turn-key system.

- **Confirm all costs have been included in appendix D:** Yes No
- **Confirm pricing includes a complete, turn-key system:** Yes No
- **Pricing Assumptions and Limitations:** Describe any assumptions made impacting the cost proposal, and any limitations (e.g., professional service hours) that apply to the listed costs.

Response:

- **Pricing Narrative:** Provide a narrative explanation of the pricing proposal. Describe in detail any limitations that apply to the proposed pricing.

Response:

- **Tiered Pricing:** If pricing is contingent upon a specific volume of students or staff or minimum purchase price, explicitly state those conditions.

Response:

- **Enrollment Impact:** Describe how growth and declining enrollment and site changes will impact the price.

Response:

Part 5: Exceptions

Instructions: Describe any exceptions to the RFP content, general expectations, specific requirements, and/or the AVUSD's standard Master Agreement and Purchase Agreement. For each exception, propose acceptable alternative language and/or provide rationale to support the exception.

Response:

Certifications and Signatures

By virtue of submission of this Proposal, **[INSERT PROPOSER'S NAME]** declares that all information provided is true and correct.

Signature:	

Date:	
Vendor Legal Name:	
Name (Printed):	
Title:	

APPENDIX “B”: INDEPENDENT CONTRACTOR AGREEMENT FOR SERVICES

This Independent Contractor Agreement for Services ("Agreement") is made and entered into as of this ____ day of _____, 20__, by and between the **APPLE VALLEY UNIFIED SCHOOL DISTRICT**, located at 12555 Navajo Rd, Apple Valley, CA 92308 ("District"), and **[INSERT CONTRACTOR'S FULL LEGAL NAME]**, a [State of incorporation and entity type, e.g., a California corporation] with its principal place of business at [Insert Contractor's Address] ("Contractor").

RECITALS

WHEREAS, the District requires specialized services and/or advice in connection with its Student Information System as further described in Exhibit A; and

WHEREAS, Contractor possesses the necessary qualifications, experience, and expertise to provide such services; and

WHEREAS, the District and Contractor desire to enter into an agreement for the provision of these services on the terms and conditions set forth herein;

NOW, THEREFORE, in consideration of the mutual covenants and promises contained herein, the parties agree as follows:

- 1. SERVICES.** Contractor shall perform the services described in **Exhibit A**, attached hereto and incorporated by this reference ("Services").
- 2. TERM.** Contractor shall commence the Services on **[Start Date]** and shall diligently perform the Services to completion on or before **[End Date]**, unless this Agreement is terminated earlier as provided herein.
- 3. SUBMITTAL OF DOCUMENTS.** Contractor shall not commence work under this Agreement until it has submitted and the District has approved:
 - A. A signed copy of this Agreement;
 - B. A completed Workers' Compensation Certification form;
 - C. A completed Fingerprinting/Criminal Background Investigation Certification;
 - D. All required certificates of insurance and endorsements;
 - E. A completed and signed W-9 Form; and
 - F. A completed Drug-Free Workplace Certification.
- 4. COMPENSATION.**
 - A. The District agrees to pay Contractor for the satisfactory performance of Services a total fee not to exceed \$[Insert Total Amount].
 - B. Payment shall be made within thirty (30) days of receipt of an itemized, undisputed

invoice that details the Services performed and the dates they were performed. Invoices shall be submitted to: Apple Valley Unified School District, Attn: Accounts Payable, 12555 Navajo Rd, Apple Valley, CA 92308.

- C. Unless otherwise specified in Exhibit B (Compensation), attached hereto, the District shall not be liable for any of Contractor's costs or expenses incurred in the performance of the Services.

5. INDEPENDENT CONTRACTOR STATUS.

Contractor is, and shall at all times be deemed, an independent contractor and not an agent or employee of the District. Nothing in this Agreement shall be construed to create a partnership, joint venture, or other-than-independent contractor relationship between the parties. Contractor is solely responsible for all matters relating to the payment of its employees, including compliance with social security, withholding, and all other regulations governing such matters.

6. MATERIALS.

Contractor shall furnish, at its own expense, all labor, materials, equipment, supplies, and other items necessary to complete the Services, unless otherwise specified in Exhibit A.

7. PERFORMANCE OF SERVICES.

- A. Standard of Care: Contractor represents that it has the qualifications and ability to perform the Services in a professional manner, consistent with the standards of care, skill, and diligence exercised by members of the same profession practicing under similar circumstances.
- B. District Approval: All work performed by Contractor shall be subject to the review and approval of the District.
- C. Originality of Services: Contractor warrants that all materials, ideas, and work product prepared by Contractor under this Agreement are original to the Contractor or that Contractor has secured all necessary rights to use them for the benefit of the District.

8. OWNERSHIP OF DATA AND WORK PRODUCT.

All reports, data, documents, and other materials prepared by Contractor in the performance of this Agreement shall be the property of the District. The District shall have a non-exclusive, perpetual license to use all such materials. Contractor shall retain its rights to its proprietary intellectual property.

9. AUDIT.

Contractor shall maintain complete and accurate records with respect to all matters covered by this Agreement for a period of five (5) years after the expiration or termination of this Agreement. The District shall have the right to audit and inspect such records at any reasonable time.

10. TERMINATION.

- A. For Convenience: The District may terminate this Agreement at any time, with or without cause, by providing thirty (30) days' written notice to the Contractor. In such event, the Contractor shall be compensated for all undisputed Services satisfactorily rendered prior to the effective date of termination.
- B. For Cause: The District may terminate this Agreement immediately for a material breach

by the Contractor if such breach is not cured within ten (10) days of written notice from the District.

11. INDEMNIFICATION.

To the fullest extent permitted by law, Contractor shall indemnify, defend, and hold harmless the District, its Governing Board, officers, employees, and agents from and against any and all claims, demands, liabilities, damages, losses, and expenses, including but not limited to attorneys' fees, arising out of or in any way connected with the negligent acts or omissions, recklessness, or willful misconduct of the Contractor, its officers, employees, subcontractors, or agents in the performance of this Agreement.

12. INSURANCE.

- A. Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, its agents, representatives, or employees.
- B. Minimum Scope and Limits of Insurance:
 - a. Commercial General Liability: \$1,000,000 per occurrence for bodily injury, personal injury, and property damage. If a general aggregate limit is used, it shall apply separately to this project or be twice the per occurrence limit.
 - b. Automobile Liability: \$1,000,000 per accident for bodily injury and property damage.
 - c. Workers' Compensation and Employers' Liability: As required by the State of California, with statutory limits, and Employer's Liability limits of no less than \$1,000,000 per accident for bodily injury or disease.
 - d. Professional Liability (Errors and Omissions): \$1,000,000 per occurrence and \$2,000,000 aggregate.
- C. Endorsements: The General Liability and Automobile Liability policies are to contain, or be endorsed to contain, the following provisions:
 - a. The Apple Valley Unified School District, its officers, officials, employees, and volunteers are to be covered as additional insureds.
 - b. The Contractor's insurance coverage shall be primary insurance as respects the District. Any insurance or self-insurance maintained by the District shall be excess of the Contractor's insurance and shall not contribute with it.
 - c. A waiver of subrogation in favor of the District.
- D. Certificates of Insurance: Contractor shall furnish the District with original certificates and amendatory endorsements affecting coverage required by this clause. All certificates and endorsements are to be received and approved by the District before work commences.

13. ASSIGNMENT.

The rights and obligations of the Contractor under this Agreement are personal and may not be assigned or transferred without the prior written consent of the District.

14. COMPLIANCE WITH LAWS.

Contractor shall, at its sole cost and expense, comply with all applicable federal, state, and local laws, regulations, and ordinances.

15. CONFIDENTIALITY.

Contractor shall maintain the confidentiality of all information, including but not limited to student records, received from the District in the course of performing the Services, in accordance with all applicable laws, including FERPA. This obligation shall survive the termination of this Agreement.

16. FINGERPRINTING/CRIMINAL BACKGROUND INVESTIGATION.

Contractor shall comply with all provisions of Education Code section 45125.1. The Contractor shall not permit any employee to have any contact with District pupils until such time as the Contractor has verified in writing to the District that such employee has not been convicted of a felony as defined in Education Code section 45125.1.

17. NOTICES.

All notices required or permitted under this Agreement shall be in writing and shall be deemed delivered when personally delivered or when sent by certified mail, return receipt requested, postage prepaid, to the addresses of the parties first set forth above.

18. ENTIRE AGREEMENT.

This Agreement, including its Exhibits, constitutes the entire agreement between the parties and supersedes all prior oral or written agreements, understandings, and representations. This Agreement may not be amended or modified except by a written instrument signed by both parties.

19. GOVERNING LAW.

This Agreement shall be governed by and construed in accordance with the laws of the State of California. Venue for any legal action shall be in the County of San Bernardino.

20. SIGNATURE AUTHORITY.

Each individual signing this Agreement represents and warrants that he or she has the power, authority, and legal right to sign this Agreement on behalf of the party for whom he or she is signing, and to bind that party to its terms.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the date first written above.

APPLE VALLEY UNIFIED SCHOOL DISTRICT

By: _____

Name: _____

Title: _____

[CONTRACTOR'S FULL LEGAL NAME]

By: _____

Name: _____

Title: _____

EXHIBIT A: SCOPE OF SERVICES

(This exhibit will be populated based on the successful vendor's proposal and subsequent

negotiations. It will detail the specific tasks, deliverables, milestones, and responsibilities related to the implementation and support of the Student Information System.)

1. Project Overview:

- A summary of the project goals and objectives.

2. Detailed Scope of Work:

- Implementation Services (e.g., project management, system configuration, data conversion).
- Software Modules to be provided.
- Training Services.
- Post-Implementation Support.
- Customization and Integration Services.

3. Deliverables:

- Project Plan and Timeline.
- System Documentation.
- Training Materials.
- Completed Data Conversion.
- Go-Live System Acceptance.

4. District Responsibilities:

- Provision of necessary data.
- Assignment of key personnel.
- Access to facilities and systems.

EXHIBIT B: COMPENSATION

(This exhibit will detail the payment schedule and breakdown of costs as agreed upon during contract negotiations, based on the vendor's cost proposal.)

1. Total Contract Amount:

- The total compensation for all Services under this Agreement shall not exceed **\$(Insert Total Amount)**.

2. Fee Schedule:

- **Software Licensing Fees:**
- **Implementation and Professional Services Fees:** (May be broken down by phase or milestone)
- **Data Conversion Fees:**
- **Training Fees:**
- **Annual Maintenance and Support Fees:**

3. Payment Milestones:

- (e.g., Payment upon contract signing, upon completion of Phase 1, upon successful Go-Live, etc.)

4. Invoicing Instructions:

- All invoices must reference this Agreement and be submitted to the address specified in Section 4.

APPENDIX “C”: WORKERS’ COMPENSATION CERTIFICATION

Project/Contract: RFP # 25-1, Student Information System

Contracting Party: Apple Valley Unified School District ("District")

The undersigned, on behalf of the Proposer/Contractor ("Contractor"), certifies the following: I am aware of the provisions of Section 3700 of the California Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code.

The Contractor shall comply with such provisions before commencing the performance of the work of this contract.

Please check one of the following:

Option 1: We have Workers' Compensation Insurance.

The Contractor is insured against liability for workers' compensation and will maintain this insurance during the life of the contract.

- **Insurance Carrier:**

- **Policy Number:**

- **Expiration Date:**

Option 2: We are exempt from the Workers' Compensation requirement.

I certify that in the performance of the work of this contract, I shall not employ any person in any manner so as to become subject to the workers' compensation laws of California, and I do not have any employees who are required to be covered by workers' compensation insurance.

I hereby certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Proposer/Contractor Business Name:

By (Authorized Signature):

Name (Printed):

Title:

Date:

APPENDIX “D”: PRICING FORM

Instructions:

- Provide a comprehensive five-year cost estimate for all components of the proposed solution.
- All costs must be inclusive of any and all charges, including but not limited to, software, hardware, implementation, training, maintenance, support, and any applicable taxes or fees.
- Costs not explicitly identified in this form will be considered included in the total proposal price and will be the responsibility of the Vendor.
- Use the tables below to itemize costs. Add rows as necessary.
- All pricing submitted shall remain firm for the duration of the contract term, including any extensions.

Proposer/Contractor Business Name: _____

Table 1: One-Time Costs

(Costs incurred during the initial implementation and setup phase)

Item Description	Unit	Quantity	Cost Per Unit	Total Cost
Implementation & Project Management				
Project Management	Hours		\$	\$
System Configuration & Setup	Lump Sum	1	\$	\$
Data Conversion & Migration				
Data Extraction & Cleansing	Hours		\$	\$
Data Migration Services (Specify Years Included)	Lump Sum	1	\$	\$
Data Validation & Auditing	Hours		\$	\$

Initial Training				
Train-the-Trainer Program	Session		\$	\$
On-site End-User Training	Days		\$	\$
Remote (Synchronous) Training	Hours		\$	\$
Development of Custom Training Materials	Lump Sum	1	\$	\$
Other One-Time Costs				
<i>(Specify Item)</i>			\$	\$
<i>(Specify Item)</i>			\$	\$
Total One-Time Costs				\$

Table 2: Annual Recurring Costs

(Costs for a 5-year period. Year 1 is the 2026-2027 school year.)

Item Description	Year 1 Cost (2026-27)	Year 2 Cost (2027-28)	Year 3 Cost (2028-29)	Year 4 Cost (2029-30)	Year 5 Cost (2030-31)
Software Licensing/Subscription					
Core SIS Platform License (Per Student/Site/District)	\$	\$	\$	\$	\$
<i>(List each proposed)</i>	\$	\$	\$	\$	\$

<i>module separately)</i>					
<i>(e.g., Notification System Module)</i>	\$	\$	\$	\$	\$
<i>(e.g., Special Education Module)</i>	\$	\$	\$	\$	\$
Maintenance & Support					
Standard Support & Maintenance	\$	\$	\$	\$	\$
Premium/24x7 Support (if not standard)	\$	\$	\$	\$	\$
Hosting (if applicable)					
Cloud Hosting Services	\$	\$	\$	\$	\$
Other Recurring Costs					
<i>(Specify Item)</i>	\$	\$	\$	\$	\$
Total Annual Recurring Costs	\$	\$	\$	\$	\$

Table 3: Five-Year Grand Total Summary

Cost Category	Total Cost
Total One-Time Costs (from Table 1)	\$
Total Annual Recurring Costs (Sum of Years 1-5)	\$

from Table 2)	
Five-Year Grand Total	\$

Table 4: Optional/Additional Costs

(Itemize costs for any modules, services, or features not included in the base proposal but available for purchase.)

Item Description	Unit	Cost Per Unit	Notes / Description
<i>(e.g., Advanced Analytics Module)</i>	Annual License	\$	
<i>(e.g., On-site Support Package)</i>	Per Day	\$	
<i>(e.g., Additional Data Migration - per year)</i>	Lump Sum	\$	
<i>(Specify Item)</i>		\$	

Table 5: Professional Services & Training Rates

(Detail hourly or daily rates for services beyond the scope of the initial implementation.)

Service Description	Unit	Rate
Project Manager / Lead Consultant	Per Hour	\$
Technical Consultant / Developer	Per Hour	\$
Trainer (On-site)	Per Day	\$
Trainer (Remote)	Per Hour	\$
<i>(Specify other roles as needed)</i>		\$

APPENDIX “E”: SERVICE LEVEL AND MAINTENANCE AGREEMENT

This Service Level and Maintenance Agreement ("SLA") is an appendix to the Master Agreement for the Student Information System (SIS) between the Apple Valley Unified School District ("District") and the selected vendor ("Vendor"). This SLA outlines the expected levels of service, support, and maintenance for the SIS.

1. Service Availability

- **Uptime Guarantee:** The Vendor guarantees a minimum of 99.9% uptime for the SIS, 24 hours a day, 7 days a week, excluding scheduled maintenance.
- **Scheduled Maintenance:** The Vendor will provide at least 48 hours' notice for any scheduled maintenance. Maintenance will be performed during off-peak hours, typically between 10:00 PM and 4:00 AM Pacific Time.
- **Emergency Maintenance:** In the event of emergency maintenance, the Vendor will notify the District as soon as possible.

2. Support Services

- **Help Desk:** The Vendor will provide a help desk available via a toll-free number and online ticketing system from 6:00 AM to 6:00 PM Pacific Time, Monday through Friday, excluding holidays.
- **Emergency Support:** 24/7 emergency support will be available for critical issues, such as system-wide outages or data loss.
- **Response Times:** The Vendor will adhere to the following response times for support requests:
 - **Critical Issues (System Down):** 1-hour response, 4-hour resolution.
 - **High-Priority Issues (Major Functionality Impaired):** 2-hour response, 8-hour resolution.
 - **Medium-Priority Issues (Minor Functionality Impaired):** 4-hour response, 24-hour resolution.
 - **Low-Priority Issues (General Questions/Requests):** 8-hour response, 48-hour resolution.

3. Maintenance and Updates

- **Software Updates:** The Vendor will provide all software updates, including patches, bug fixes, and new releases, as part of the annual maintenance fee.
- **Update Notification:** The District will be notified of all updates at least one week in advance, with detailed release notes provided.
- **Data Integrity:** The Vendor is responsible for ensuring the integrity of all District data during any maintenance or update process.

4. Data Backup and Recovery

- **Data Backups:** The Vendor will perform full daily backups of all District data. Backups will

be stored in a secure, off-site location.

- **Data Recovery:** In the event of data loss, the Vendor will be responsible for restoring the data from the most recent backup within 4 hours of being notified of the incident.
- **Disaster Recovery:** The Vendor will maintain a comprehensive disaster recovery plan to ensure the continuity of services in the event of a major outage or disaster.

5. Performance Monitoring and Reporting

- **Performance Monitoring:** The Vendor will continuously monitor the performance of the SIS to ensure it is meeting the agreed-upon service levels.
- **Quarterly Reports:** The Vendor will provide the District with quarterly reports detailing system uptime, support request metrics, and any security incidents.

6. Security

- **Data Security:** The Vendor will implement and maintain robust security measures to protect District data from unauthorized access, use, or disclosure.
- **Security Audits:** The Vendor will conduct annual security audits and provide the results to the District upon request.
- **Data Breach Notification:** In the event of a data breach, the Vendor will notify the District within 24 hours of discovery and will cooperate fully with the District's investigation and response efforts.

APPENDIX F: STANDARD STUDENT DATA PRIVACY AGREEMENT (CA-NDPA)

The Apple Valley Unified School District participates in CITE's (California IT in Education) Privacy Services Program (<https://www.cite.org/privacy-services>). As part of this RFP, the District will use the standard boilerplate National Data Privacy Agreement (NDPA) provided through this program.

Vendors must confirm their agreement to execute and abide by all terms and conditions set forth in the current CA-NDPA standard agreement. A sample of this agreement is available for review in the CITE_SECURE_CA-NDPA_v1_5.pdf document provided with this RFP. The final agreement will be executed between the successful vendor and the Apple Valley Unified School District.