
Request for Proposal

Integrated School Financial and Human Resource Software

For SAU 19, including the School Districts of Goffstown and New Boston

11 School Street
Goffstown, NH 03045
(603) 497-4818

REQUEST FOR PROPOSAL

SAU 19 and the Goffstown and New Boston School Districts (the SAU) seek proposals for a complete enterprise management software application to include installation, implementation, technical support and training.

The SAU reserves the right to request additional information or clarification of any submitted proposals. Proposals and proposal pricing must remain open for one hundred twenty (120) days. This solicitation will become an addendum to any resultant contract. Proposals may be withdrawn or modified by the submitting contractor at any time prior to the closing date and time for receipt of proposals.

Copies of the RFP are available at the SAU 19 Business Office, located at 11 School Street, Goffstown, NH 03045 and also from the SAU 19 website, www.goffstown.k12.nh.us. The Business Office is open to the public Monday through Thursday from 8:00 AM to 4:30 PM. The District is an EOE employer and encourages proposals from minority, women-owned, and Disabled Veteran Business Enterprise (DVBE) businesses.

The RFP is not a low-bid price competition. Instead proposals will be evaluated in accordance with the submitter's responsiveness to the requirements set forth within the RFP, at the SAU's sole discretion. Responsive proposals shall provide that the terms of the proposal shall be valid for at least one hundred eighty (120) days. Any contract awarded will be based upon the best perceived value to the SAU. *Please note that there will not be a public opening of the bids and that there is the possibility of simultaneous negotiations with multiple contractors. All submitted proposals will be made available for review after contract award.*

Sealed proposals will be received by either mail or personal delivery until **3:30PM, Friday, September 15, 2017 EDT**. Proposals received after the specified time will not be considered. Proposals are to be sealed and plainly marked on the outside of the envelope/box with "**PROPOSAL FOR INTEGRATED SOFTWARE AND IMPLEMENTATION SERVICES**" with name of firm submitting proposal. It is the sole responsibility of the contractor to assure that their proposal is received by the SAU prior to the time specified. One (1) signed original and fifteen (15) identical electronic copies (CD format) should be submitted to the following address:

SAU 19
Attn: Business Administrator
11 School St.
Goffstown, NH 03045

RESERVATION OF RIGHTS:

The SAU reserves the right to reject any or all proposals, to waive any informality in the RFP process, or to terminate the RFP process at any time, if deemed by the SAU to be in its best interest.

The SAU reserves the right at any time during the RFP or contract process to prohibit any further participation by a contractor or reject any proposal submitted if the evidence submitted or investigation of the contractor fails to satisfy the SAU that the contractor is properly qualified to fulfill the obligation of the contract and to complete the work contemplated therein.

INHERENT ACCEPTANCE:

The submission of a proposal constitutes the contractor’s acceptance of and agreement to the terms and conditions of this Request for Proposal.

EXCEPTIONS TO PROPOSAL:

The contractor shall, on a separate sheet of paper, include any exceptions to the conditions of the proposal. This sheet shall be labeled "Exceptions to Proposal Provisions" and shall be attached to the proposal. If no exceptions are stated, it will be understood that all terms and conditions will be complied with, without exception.

INSURANCE:

The selected contractor shall not commence work under the contract until proof of all required insurance has been submitted to and approved by the SAU. The following insurance is required:

Comprehensive General Liability in an amount not less than \$2,000,000 combined single limit per occurrence for bodily injury and property damage. SAU 19, and the Goffstown and New Boston School Districts must be shown as additional insureds with respect to this coverage.

Certificates will indicate no modification or change in insurance shall be made without thirty (30) days written advance notice to the SAU.

ANTICIPATED TIMELINE

The following timeline reflects an optimal plan for the SAU at the present time. An actual implementation schedule will be mutually agreed upon by the SAU and the chosen contractor. Contract terms will be determined and negotiated between the SAU and selected contractor upon the approval of the Committee’s recommendation by the SAU Board.

Release of RFP.....	July 17, 2017
Proposals Due.....	September 15, 2017
Client Visits (if deemed necessary).....	Fall 2017
Software Committee Presentation to the Goffstown and New Boston School Boards.....	October 2017
Software Committee Contractor Recommendation to SAU Board.....	December 2017
Implementation Process Begins.....	TBD
New Software Online.....	July 1, 2018

EVALUATION PROCESS:

There will be no public bid opening. The SAU Software Search Committee will evaluate each proposal, taking into consideration each required element stipulated within this RFP. A recommendation as to which system best meets the needs of the SAU (as determined by the Software Search Committee) will be presented to the School Administrative Unit 19 Board.

CLIENT REFERENCE DEMONSTRATIONS:

If deemed necessary, representatives of the SAU will schedule visits to client references to observe the applications in an actual working environment. These visits will be conducted as part of the RFP evaluation process, prior to the award of any contract. Client visits will be conducted if a client reference is within a reasonable distance to travel. If this cannot be accommodated, a client call or webinar would be deemed acceptable.

AWARD:

The award/negotiation sequence will be based on a selection methodology established by the SAU Software Search Committee. The SAU will be the sole judge in evaluation considerations and may make an award to the contractor who submits the proposal judged by the SAU to represent the best perceived value to the SAU. The award will only be given to a responsible contractor, whose product(s) effectively meet the SAU's requirements to perform the services specified herein.

PROPOSAL COSTS:

Those submitting proposals do so entirely at their expense. There is no expressed or implied obligation by SAU to reimburse any individual or firm for any costs incurred in preparing or submitting proposals, providing additional information when requested by the SAU, or for participating in any selection interviews and/or contractor demonstrations.

INQUIRIES:

Questions about the proposal or requests for clarification concerning the meaning or interpretations of this RFP should contact:

Ray Labore
Business Administrator
(603) 497-4818 ext. 5754
ray.labore@sau19.org

Please include the words "PROPOSAL FOR INTEGRATED SOFTWARE AND IMPLEMENTATION SERVICES" in the subject line of email messages. The responses to any such questions will be posted online with the original RFP in the **Request for Proposal** Section on SAU 19's website at www.goffstown.k12.nh.us

All proposals will become the property of the SAU.

CURRENT STATUS:

The SAU's existing financial software is provided by PowerSchool (formerly SunGard) K-12 eFinance Plus. This software is used for a majority of financial and human resource functions including Fund Accounting (General Ledger, Budgeting, Purchasing, Accounts Payable, Accounts Receivable), and Human Resources (Demographic Information, Payroll). Peripheral software is in place for items such as professional development, student management, and job applicant tracking among other functions.

SCOPE OF SERVICES:

The SAU is seeking proposals for integrated school financial and human resources software. Ideally, a single contractor will provide this integrated solution for all systems as well as ongoing support for those systems.

Specifically, the contractor will:

- Deliver a fully-integrated, web-based fund financial and human resource software package that meets the needs of the SAU.
- Configure all related modules and files to make the system 100% operational.
- Provide comprehensive education for system operations and configuration. Training shall be provided in a hands-on fashion at the SAU office, with complete and necessary documentation.
- Convert / import existing system data into the new applications. Contractor shall work with current system provider to ensure a 100% successful data conversion.
- Ensure all modules are complete, have been tested, and are ready for operation on the “go-live” date.
- Provide follow-up training as needed, as well as dedicated support after the initial training and implementation of the system.

The selected contractor will be considered as the prime contractor and will be required to assume total responsibility for the delivery, installation, setup, training, debugging and maintenance of all hardware, software, and related services offered in the proposal whether or not the company is the manufacturer, producer, value added reseller, author or supplier of the items. The contractor shall submit a list of any sub-contractors whose services are suggested to be utilized in the execution of work covered in these specifications. Should there be any change in this list during the contract period, contractor shall inform the SAU. The SAU reserves the right of approval of such sub-contractors.

REQUIRED SYSTEM FUNCTIONS:

The proposed software, once implemented, must meet the following requirements and capabilities:

- Compatible with current versions of Microsoft Windows and Apple Macintosh OS end-user systems running current browser software without requiring any additional plugins. Allow for import and export of data from Microsoft and / or Apple systems and products.
- The application may be hosted locally or remotely. If hosted locally, software must be virtualization-friendly and should support Windows Server 2012 or later. If hosted remotely, contractor must provide for a disaster recovery plan.
- Applications / Modules for the following functionalities are required: General Ledger, Budgeting, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, Work Order and Facilities Management, HR/Payroll, Personnel, Personnel Planning, Employee Access Center and Benefits Management.
- The software should be designed specifically for school districts in accordance with GASB and GAAFR guidelines. The system must accommodate fund accounting, encumbrance accounting, and budgetary accounting, as these terms are generally understood in the school district environment. The system must have the ability to produce an audit trail for all file

and record changes for the SAU and must include a reporting capability that will produce financial statements and supporting schedules.

- Software must be maintained and updated to ensure compliance with modifications to GASB and GAAFR guidelines.
- Software must be maintained and updated to ensure compliance with all HIPAA laws and regulations.
- The software should provide for a minimum of 20 concurrent users with access to appropriate accounts and data through a permissions-based structure, with definable security down to the user level.
- The software must either have the functionality of or ability to integrate in some manner (full integration or upload capability) with external systems currently used by the SAU and member districts. See Appendix D for listing of peripheral systems used and their function.
- The software application must allow for external user authentication sources such as LDAP or Active Directory
- Fully integrated modules requiring information to be entered into the system only once.
- Paperless processing capabilities and scanned document storage capabilities (for example, attaching scanned invoice documents to the AP file).
- Real-time processing.
- Self-contained (preferable) or third-party report writer which allows the SAU to designate personnel to design and generate customized reports of all data held in the system, including the ability to run SQL queries
- Documentation in the form of online help, manual and / or procedure sheets.
- Practice / training area or database for training and/or testing.
- Graphical User Interface (GUI) for all users.

PROPOSAL FORMAT / EVALUATION CRITERIA

In order to ensure a uniform review process and obtain the maximum degree of compatibility, it is required that the proposals be organized in the manner specified below:

1. **Cover Letter**: The submitting Contractor should identify the RFP subject, the name of the local address, telephone number, name and title of contact person and date of submission.
2. **Certification Statement**: the enclosed certification statement signed by a representative who has authority to obligate the company. See Appendix C.
3. **Table of Contents**: Provide clear identification of the material by section and by page number.
4. **Company History**: Information related to the contractor's qualifications and resources.
 - a. Briefly describe contractor's history, number of employees and years in existence.
 - b. Provide details of the contractor's financial status and stability.
 - c. Describe experience in Implementing School Financial and Human Resources Software – contractors should provide detailed summary of

experience implementing municipal and / or school district financial software. Contractors should highlight experience interacting with other software solutions, importing existing financial data, specifically importing financial data from Power School's eFinance Plus software, and working with other NH School Districts or Multi-District SAU's of similar size to SAU 19.

5. **Qualifications and Experience of Staff:** Include brief biographies of staff to be assigned to the project
6. **References:** List at least three (3) client references for who like work has been completed (see Appendix E attached reference sheet).
7. **Costs:** Using the lists discussed above, provide individual costs for the services, equipment, materials and installation required to complete each work element. Describe the payment structure for the project, required deposits, progress payments, etc. that you propose for the project work requested within this RFP.
8. **Warranty:** Provide terms, conditions and length for all proposed warranties on labor and materials.
9. **Proposed Software and Computing Environment:** contractors should use this section to describe in detail the features and capabilities of the software (see Appendix A for details).
 - Functionality of Modules – contractors should describe the functionality of the software modules and the interaction between modules. Also, discuss the expandability of the solution and discuss the scalability of modules/software.
 - Internal Control/Audit Trail – contractors should discuss the software's ability to conform to GASB and GAAFR guidelines, to accommodate fund accounting, encumbrance accounting, and budgetary accounting, as these terms are generally understood in the / school district environment.
 - Optional Software Modules – contractors can use this section to provide any information about optional software modules offered by the contractor not requested herein.
10. **Data Conversion:** – contractors should provide a sample project plan which assumes a "go-live" date of July 2018, detailing data conversion to be implemented as part of this project. See Appendix A for details.
 - Implementation Strategy and Schedule.
 - Support Program – describe the nature of any post-implementation support provided by the contractor, including the ongoing costs associated with technical support and what is included with those costs. See Appendix A for additional details.
 - Exceptions to Proposal Provisions – contractors should include any exceptions to the conditions of the proposal.

SELECTION / EVALUATION OF PROPOSALS:

The intention of the SAU is to procure functionally complete, cost-effective, and integrated software applications. Responses to this RFP will be evaluated using the following criteria:

- Quality, clarity, and responsiveness of proposal in conformance with instructions, condition, and format contained herein.
- Ability to meet technical requirements.
- Ability to provide an integrated, all-in-one system that includes modules that may be purchased in the future.
- Timeliness and professionalism of on-going support.
- Cost and quality of software and implementation services.
- Cost of ongoing maintenance.
- Contractor demonstration of the proposed system's performance.
- Reference checks, including possible demonstrated performance of proposed system elsewhere in the public sector.

GENERAL INFORMATION

1. **Interview:** The submitting firm may be required to make a presentation of their proposal. This will provide an opportunity to clarify or elaborate on the proposal but will not, in any way, provide an opportunity to change any cost or fee amount originally proposed. Should the SAU choose to schedule presentations, respondent(s) will be notified of time and location.
2. **Modifications:** The District will allow both submittal modifications and withdrawals up to the solicitation's closing time.
3. **Request for Additional Information:** The submitting firm will furnish clarifying information if requested by the District.
4. **Acceptance/Rejection/Modification to Proposals:** The District reserves the right to negotiate modifications to proposals that it deems acceptable, reject any and all proposals, and waive minor irregularities in the procedures.

OTHER DEFINITIONS, CONTRACT TERMS AND CONDITIONS:

The contract documents shall consist of the "Request for Proposal Integrated School Financial and Human Resource Software", all documents submitted by the firm in satisfying this request, and a signed contractual agreement executed in a form approved by the SAU.

Default – The SAU shall have the right to declare the contractor in default if (a) the contractor becomes insolvent; (b) the contractor makes an assignment for the benefit of creditors; (c) a voluntary or involuntary petition of bankruptcy is filed by or against the contractor or (d) the contractor is unable to provide evidence of required insurance coverage as set forth below. If the contractor is declared in default, or in the event the contractor is foreclosed for any reason, the SAU will have the right to exercise termination options.

Contractor – Any combination Companies and their respective sub-contractors that are required to provide the requested services.

Indemnification – The contractor must agree to defend, hold harmless, and indemnify the SAU, their officers, agents and employees against any and all claims, or injuries to any person or firm, arising out of the actions of the contractor, its officers, agents, or employees in fulfilling the terms of its contract with the SAU.

Non-Appropriation – Any resultant contract shall include a non-appropriation clause which states, “In the event that sufficient funds are not appropriated for project completion and other requested services during the ensuing fiscal year, the SAU may terminate this agreement by written notice within thirty (30) days of adoption of the budget for the fiscal year in question, and the agreement shall be terminated effective immediately.”

Non-Transferable – The contractor shall not have the right to transfer or assign the contract to any other person, company or corporation.

Payment Terms – To be determined. If, in the opinion of the SAU, the quality of service is unsatisfactory or if any other non-performance or sub-standard issues arise, payment may be withheld. The amount and withholding period are at the discretion of the SAU.

Termination for Performance – The contract may be terminated at any time by the SAU for unsatisfactory performance. In such case, the SAU will provide written notice to the firm citing the unsatisfactory performance, giving the firm ten (10) working days to improve its performance to the satisfaction of the SAU. In the event that the firm’s performance does not improve to the satisfaction of the SAU, the contract for services may be immediately terminated.

APPENDIX A

PROPOSED SOFTWARE AND COMPUTING ENVIRONMENT:

The contractor must present, in detail, features and capabilities of the proposed software which includes the following:

- List all current software, including proposed configuration and most recent release date.
- Provide information about the system requirements and hardware specifications for the proposed software. Include information on hardware platforms, operating systems, database management systems, development tools, network protocols, etc. for each component of the application (i.e. client, server, host).
- Explain import/export capabilities.
- Describe system security, including setup, types (read, edit, etc.).
- Describe how the software handles concurrent users accessing information simultaneously. Who gets priority? Does the record lock?
- Explain drill down capabilities in all areas of the application.
- Explain capability to attach electronic files to all areas of the application.
- Describe system flexibility in adding user-defined fields.
- Describe how the system handles similar entity information as it is entered into the system, in an effort to deter duplication of information such as employee numbers and social security numbers, and contractor tax identification numbers, etc.
- Describe file accessibility to report writers. Is a third party report writer required? Available? Do you provide / require a proprietary report writer?
- List standard reports and provide an example of every standard report included with each of the desired modules. Describe the level of effort or training required to customize these reports.
- Can reports be set up to run automatically based on time or data criteria?
- Can data from reports be exported?
- Describe the ability to provide ad hoc and customizable reporting.
- Describe the ability to perform what-if analysis typical to school district operations.
- Describe correspondence tracking within the system.
- Describe workflows and automatic ticklers within the system, if any.
- Describe any alerts within the system.

OPTIONAL SOFTWARE:

Include a description of any products, features or other value-added components available for use with the proposed software application(s) that have not been specifically requested in this RFP.

Consideration of these products, features, or other value-added components will be given where these may be of value to the SAU.

IMPLEMENTATION SERVICES:

The contractor should provide a detailed plan for implementing the proposed system. It is the SAU's desire to achieve full implementation and use the new system beginning July 1, 2018. This information should include:

- Detailed implementation methodology (project management services).
- Conversion and import of current data support.
- Overview of proposed onsite training, including options for end-users and management personnel.
- Implementation and training plan including deliverables for each stage of the project.
- Provide a sample project plan which assumes start date of July 2018.

It is recognized that this conversion contains many modules / functions and as such, we understand the fact that certain modules may have to be implemented at a later date. It is the SAU's intent to ensure a smooth transition, therefore a rush implementation is not desired. We will look to each contractor's implementation experience and consider suggestions for an optimal implementation plan.

SUPPORT PROGRAM:

Specify the nature of any post-implementation support provided by the contractor including:

- Describe how the service / software is maintained after installation.
- Provide a copy of your standard maintenance agreement.
- Explain your warranty and warranty period.
- Availability of future upgrades and product enhancements and potential fees associated.
- Describe training programs for users. This description should provide information about user training prior to 7/1/2018 when the software will 'go live' and ongoing training for users and new employees.
- Availability of user groups.
- Other support (i.e. onsite, remote dial-in, web site access to patches, fixes, knowledge base, etc.).
- Telephone support (i.e. toll-free support hotline, hours of operation, etc.).
- Describe and provide examples of documentation available to users, including but not limited to: user manuals, how-to guides, list serves, chatroom discussions, and/or helpdesk solutions.
- Problem reporting and resolution procedures.

APPENDIX B

PROPOSED SOFTWARE AND COMPUTING COSTS

The following cost data should be provided to describe the proposed cost model(s) to fund and pay for the purchase of the software:

- Detailed cost breakdown for each module (General Ledger, Budgeting, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, Work Orders and Facilities Management, HR/ Payroll, Personnel, Employee Access Center, Benefits Management, and a proposed package cost.
- Detailed Cost Breakdown for System Implementation including data conversion, training, etc.
- Hourly Rates for any tasks not outlined in the RFP, additional training, custom report writing and/or custom modifications, etc.
- Detailed Cost for Software Licenses – proprietary and third party.

Cost data should be provided to describe the annual cost of maintenance, ongoing support, and / or software / user license after install for a period of five (5) years; also include anticipated support cost increases. Is there a standard “not to exceed” percentage increase in annual support costs?

Describe other applicable costs not specified herein.

APPENDIX C

CERTIFICATION STATEMENT
SAU 19, Goffstown School District, and New Boston School District
Request for Proposal for Integrated Financial & Human Resources Software

The proposal in its entirety shall be valid for 120 days from the proposal due date.

If awarded the contract, all entities of the SAU will be named as additional insured on the liability insurance policies referenced in paragraph 2-4 of the proposal requirements. Proof of this coverage will be provided to the SAU.

The proposal has been created independently and without collusion designed to limit independent bidding or competition.

I certify that I am authorized to bind _____ (company) to the proposal submitted with this certification statement.

Proposer's Signature

Date

Proposer's Printed Name

APPENDIX D

LISTING OF SOFTWARES USED IN ADDITION TO CURRENT ENTERPRISE MANAGEMENT SOFTWARE:

System	Function(s)
Active Directory	Authentication
Office365	Productivity, collaboration, storage and email
Google Docs	Productivity and storage
Oasys	Performance evaluation
MLP (My Learning Plan)	Professional Development
PowerSchool (Goffstown)	Student Management Database
Web2school (New Boston)	Student Management Database
Applitrack	Applicant Tracking
Moodle*	Classroom Management
Naviance (Goffstown)	Guidance (College Applications)
School Messenger (Goffstown)	SAU wide communications
One or Zero* (Goffstown)	Tech and Facilities work order system maintained by the Tech Team
Big Teams.com (Goffstown)	Athletic Scheduling System
Appointment Book Manager	Website extension for Parent Conference Scheduling
Joomla* (SAU19)	SAU 19 Website
Meal Magic (Goffstown)	Food service software that integrates with PowerSchool
Meal Time (New Boston)	Food service software
Efunds (Goffstown)	Online food service pre-pay system
Egroupware* (Goffstown)	Guidance Scheduling and Booking
Code-ed (New Boston)	Announcement System
Cisco (Goffstown)	Phone system/call manager
Syn-Apps (Goffstown)	PA/Panic System
NWEA	
AimsWeb	Special Education
Destiny	Library
Big Ideas Math	
Reading Streets	
Successmaker	Credit Recovery
VLACS	Virtual Academy
Checkin (Goffstown)	Electronic Student sign-in system (Maintained by Tech Team)
Inventory (Goffstown)	Electronic Asset Management system (Maintained by Tech Team)
Xerox Mobile Print Solution (SAU19)	Gives visitors/guests the ability to print to a Xerox Copier Collects & processes syslog data (websites visited, internet data usage)
SonicWALL Analyzer (SAU19)	
FileWave (SAU19)	iPad Management Tool
Under Review / Consideration	
Aesop	Sub Calling, Absence Management
Qware or School Dude	Facilities Management
Veritime	Electronic Timeclock

APPENDIX E

LIST OF REFERENCES

IMPORTANT: This form must be returned with the bid proposal form.

1. Name of Company

Address

Contact Person/Title

Telephone Number

2. Name of Company

Address

Contact Person/Title

Telephone Number

3. Name of Company

Address

Contact Person/Title

Telephone Number

Authorized Signature Date

Printed Name and Title

APPENDIX F

RFP Receipt Acknowledgement

Contractor Name:

Contractor Address:

Contact Person:

Phone Number:

Contact person's E-mail Address:

Date RFP Acquired:

Signature:

Printed Name:

Title:

(This sheet must be returned to the SAU 19 Business Office by September 7, 2017)