January 17, 2020

REQUEST FOR PROPOSAL

COMPREHENSIVE STUDENT INFORMATION SYSTEM

Charlotte, North Carolina

Issue Date: January 17, 2020

Due: February 6, 2020

REQUEST FOR PROPOSAL FOR COMPREHENSIVE STUDENT INFORMATION SYSTEM

SUMMARY

Charlotte Country Day School is soliciting proposals for a comprehensive, fully integrated student information system that not only meets the requirements set forth in this Request for Proposal (RFP), but is also flexible and scalable in order to meet its future business and technology needs. The purpose of the RFP is to provide interested vendors with sufficient information to enable them to develop and submit proposals for application software that will fulfill the specified information processing needs. Charlotte Country Day School is looking for a system that integrates the following modules:

- Advancement
- Admissions
- Athletics
- Student Billing
- Finance (AP/AR/GL, Fixed Assets)
- Registration
- Scheduling (JK-12)
- Enrollment
- Attendance
- Transcripts & Grading
- Learning Management System

The final scope of a new system and the timeline for its purchase and implementation will depend on the responsiveness of the specific characteristics of the proposed system to this RFP, the responsiveness of the proposed system as a whole to this RFP, the capabilities of the proposing vendor and the price. Charlotte Country Day Schools preference is to begin the implementation process July 2020.

WHO WE ARE

Founded in 1941, Charlotte Country Day School (CCDS) is a JK-12 day school, with over 1,665 students that hosts an annual budget of $42 MM.

Our Mission

Through excellence in education, Charlotte Country Day School develops the potential of each student by fostering intellectual curiosity, principled character, ethical leadership, and a responsibility to serve.

Our Key Values and Commitments

Educational Excellence: We develop a love for learning by discovering and celebrating each student's abilities and talents through engagement with exceptional teachers in distinctive academic, artistic, athletic, and extracurricular experiences.

Character: We instill and expect integrity, honesty, moral courage, personal accountability, and compassion for others.

Community: We respect each individual, embrace diversity, and value the relationships uniting us as a school and connecting us with our local and global communities.

Service: We empower our students to address social, environmental, and global issues and to realize the obligation and value in giving of themselves for the public good.

Affirmation of Community

Charlotte Country Day School is committed to living as an authentic, inclusive community. Our pursuit of this commitment to community recognizes and affirms the richness brought by difference and discovered through commonality.

PROJECT GOALS AND OBJECTIVES

The following lists the major capabilities of the integrated student information system that Charlotte Country Day School wishes to purchase. Each vendor is strongly encouraged to address each and every one of these capabilities in its response, as well as to include "value-added" items that will supplement or enhance the capabilities listed below.

- Replace current SIS--Blackbaud Edge Products (Raisers Edge version: 7.96.6402.14, Education Edge version: 7.87.164.0022, Financial Edge version   )--as well as in-house developed systems.
- Provide complete integration between student, teacher, parent, alumni as well as development and financial processes.
- Shift hosting from local servers to cloud-based servers;
- Eliminate standalone business processing systems, independent tracking mechanisms, and paper-intensive manual processes.
- Provide detailed student billing including food, book store, auxiliary programs, etc.
- Increase segmented and personalized communication opportunities.
- Increase information analysis capabilities that support enhanced decision-making capabilities.
- Elimination of duplicate effort, especially concerning redundant data entry processes.
- Allow Charlotte Country Day School to easily develop and deliver flexible custom reports and information. *(Currently using Crystal Reports.)*
- Provide modern processing capabilities such as drilldown, audit trail, and workflow approvals.
- Provide a consistent user interface, online documentation, and context-sensitive help.
- Establish a foundation for integrating new systems in the future.
- Provide opportunities for parent communications.

By virtue of submitting a proposal, interested parties are acknowledging the following:

This RFP is a request for both software and implementation services. As such, proposals from implementation firms alone or software firms without an implementation mechanism will be deemed non-responsive.

Charlotte Country Day School reserves the right to reject any or all proposals if it determines that select proposals are not responsive to the RFP or if the proposals are judged not to be in the best interests of

Charlotte Country Day School. Charlotte Country Day School reserves the right to reconsider any proposal submitted at any phase of the procurement. It also reserves the right to meet with select proposers at any time to gather additional information. Furthermore, Charlotte Country Day School reserves the right to delete or add functionality (i.e., modules) up until the final contract signing.

Each and every vendor submitting a proposal agrees that the pricing and terms set forth in its proposal shall remain firm, fixed, and valid for a period of two years from the date that Charlotte Country Day School receives the proposal. Such pricing and such terms shall also remain firm, fixed and valid for the full duration of each and every agreement arising out of this RFP executed by the successful vendor with Charlotte Country Day School, except as otherwise agreed mutually by the parties. Pricing and terms for implementation services shall be submitted on a "not to exceed" basis and shall be firm, fixed and valid for the full duration of each and every agreement executed by the successful vendor with Charlotte Country Day School except as otherwise agreed mutually by the parties. No proposal shall be considered unless it contains pricing and terms on a "not to exceed basis."

SCOPE

Minimal requirements must be met in order to be considered through this RFP. Ideally, SIS needs begin at online registration and proceed through the lifecycle of the family including attendance tracking systems, academic processes (i.e. grading), fundraising, billing, alumni relations, etc. At each of these data entry and review points, input must be single entry user-friendly tools and processes accessible to multiple technical skill levels. Charlotte Country Day School is exploring options and hopeful to find a product or suite of products that meets as many of our SIS needs as possible with ease of implementation to ensure maximization of the product and employee time.

General Requirements

- Software must be compatible with PC Windows 10, 64-bit client;
- Software available as a SaaS solution;
- Software for the end user must be compatible with 64-bit Microsoft Windows 10, Apple Mac OS, iOS, and/or Google Chrome Operating systems;
- Software on the back end must be compatible with 64-bit Microsoft Server in addition to being added to a domain;
- SSO integration with standard SAML LDAP, Microsoft Active Directory, Microsoft Office 365, or Google an option for Authentication;
- Must have mobile/app access;
- Must be integrate with USBE required UTrex data reporting services;
- Must have an API/SDK for system integration;
- Must support generic job scheduling for automation of tasks;
- Must have OneRoster file creation;
- Must NOT require the use of java or flash on end user workstation;
- Must support data at rest and data in flight encryption;
- Must be compatible with/offer integration to other Learning Management Systems (please provide a full list of integration options;

- Must allow home access to teacher communication by email or comparable interface;
- Must include online registration and parent portal for communication and information updating;
- Must include transcript creation with weighted GPA;
- Must include dynamic and customizable grade book for standards-based and traditional grading systems;
- Any management and transfer of student data must be secure;
- System must be able to utilize existing network and power wiring;
- All software must be able to provide customizable reports;
- Service support response required (Monday – Friday) includes general response within 1 hour and remedy within 24 hours, and emergency response within 15 minutes and remedy within 3 hours or less;

Value-Added

- Integrated behavior system for discipline and intervention input and data monitoring;
- Integrated assessment elements for classroom teaching and learning;
- Compatibility with TalentEd systems.

Qualifications

The contractor must have a minimum of three (3) years of successful implementation in a comparable educational setting operating multiple program integrations for dashboard data from the SIS and other ancillary tools, software, and assessments.

RFP RESPONSE OUTLINE

RFP's must be concise and in outline format. Pertinent supplemental information should be referenced and included as attachments. All RFP's must be organized and tabbed to comply with the following sections:

1. Executive Summary: Provide a one or two page executive summary that briefly describes the proposal, highlighting the major features of the proposal. Summary must clearly indicate any proposal requirements that cannot be met. Proprietary information requests should be identified in this section for consideration.
2. Response to Scope of Work, Requirements, and Qualifications: Provide detailed information specifically addressing the scope of work, requirements, qualifications, and a proposed schedule of implementation. Be concise.
3. References. Provide contract references from three (3) separate schools that are currently using each product that you are proposing. Preferably one or more of these references would have similar constituent size. The contact person must be a person who is involved in the actual utilization of the product and cannot be a spokesperson who is unfamiliar with the details of how the software products work. Contact information should include first and last name of the contact, their phone number, and e-mail address. The School reserves the right to use any and all references, or contact additional references that will aid in its decision process.

4. Costs. At the time of your response, provide your best pricing for all products. Include an itemized price breakdown of all individual components offered as part of the software, hardware/equipment, installation and implementation, maintenance, and support.

PROJECT TIMELINE

ACTION STEP	DEADLINE	RESPONSIBILITY
RFP issued	January 17	Charlotte Country Day School
Deadline for submission	February 6	Interested parties
Proposals distributed to SIS Decision Making Committee for review	February 10	Charlotte Country Day School
Proposals reviewed by SIS Decision Making Committee by phone and finalists selected	February 14	Charlotte Country Day School SIS Decision Making Committee
In-person presentations by finalists to SIS Review Committee	March 6	Finalists Charlotte Country Day School SIS Decision Making Committee
Finalists notified of decision	March 20	Charlotte Country Day School

PROPOSAL SUBMISSION

Please e-mail your proposal to Shannon Drosky, director of marketing & communications, at shannon.drosky@charlottecountryday.org by February 6, 2020, and also submit a written copy to Shannon's attention at Charlotte Country Day School, 1440 Carmel Road, Charlotte, NC 28226. If you have any questions, don't hesitate to call Shannon at 704-943-4546.

Many sincere thanks for your interest in this opportunity.