

Perspectives Charter Schools
Request for Proposal
Student Information System
January 13, 2014

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INTRODUCTION

Company Overview

Company Background

Perspectives Charter Schools was launched in 1993 by two Chicago Public School teachers who believed that character development and academic achievement are interrelated. They created a curriculum called A Disciplined Life and started a “school within a school” at Dyett Middle School on Chicago’s South Side. In 1997, Perspectives Charter Schools became one of the first charter schools in Illinois. By 2004, Perspectives had attracted enough attention and supporters to move into an award-winning new building designed by Perkins + Will, now known as Perspectives Rodney D. Joslin Campus.

In 2005, after 8 years of steady expansion of enrollment and with Joslin students reaching ever higher rates of academic growth each year, Perspectives was persuaded by Mayor Richard J. Daley, then-CEO of Chicago Public Schools Arne Duncan and the Greater Auburn-Gresham Development Corporation to assume management of a 350,000 square foot former high school campus at 81st and May serving the Auburn Gresham community. Perspectives opened three schools: Perspectives Middle Academy, Perspectives Leadership Academy, and Perspectives High School of Technology. With their first graduating classes in 2010, these schools more than doubled the graduation rate of the high school that had previously served the community.

As the transformation in Auburn Gresham was just beginning, Perspectives partnered with the Illinois Institute of Technology to open Perspectives/IIT Math & Science Academy in 2008. In the spring of 2012, this school celebrated its first graduating class, with 95% of graduates going on to college.

Today, Perspectives Charter Schools serves nearly 2,300 students in grades six through twelve at five open-enrollment, tuition-free public schools.

Current Environment

Student Information System (SIS)- PowerSchool, possible replacement next year

Financial System: Blackbaud Financial Edge

HR System: Paycom

Email- Google Apps for Education

Donor and Alumni Management- Salesforce.com

Microsoft Office 2010 Professional x64

Windows Operating System: Windows 7 Pro x64, Server 2008 R2

Microsoft SQL Server 2008 (when necessary)

MFP Copiers- Xerox D95 at every location/campus

Project Overview

Perspectives Charter Schools (PCS) is asking for proposals to provide an integrated, enterprise Student Information System (SIS). The comprehensive SIS described in this document is intended to support PCS' vision of a fully integrated, web-based student information system.

PCS' primary goal for this Request for Proposals (RFP) is the selection, implementation, and operation of a system that will meet the needs of PCS on a long-term basis by providing functionality that improves and expands over the lifetime of the product. The vendor should have experience with a wide range of K-12 school districts, including charter schools.

The proposed system should provide the following strategic benefits to our organization:

1. Increase functionality while reducing operational burden and costs associated with the reliance on third-party interfaces, including:
 - Parent Notification (School Reach)
 - Student Applications, Enrollment and Registration (InfoSnap)
 - Online Payment (Revtrak)
 - Alumni Tracking (Salesforce)
 - Project Management (Epicenter)
2. Enable users at every level to interact with student data-empowering them to track, trend, analyze, interpret and act quickly, without special data processing.
3. Increase the speed, agility, flexibility and responsiveness to provide current and future internal, state and federal data reporting requirements.
4. Support data-driven decision making and provide advanced reporting with an evolving, customizable system.
5. Serve the various audiences and stakeholders in PCS:
 - Students and Families
 - Alumni
 - Teachers
 - Administration
 - State and federal education agencies.
6. Provide ongoing training and customer support access to all end users.

Response Requirements and Timeline

Response Submission

The Student Information System RFP response is due by February 3, 2014 at 5pm CT. Late proposals will not be accepted.

Please submit your response in electronic format to:
Perspectives Charter Schools
Tony Seiden
TSeiden@pcsedu.org

Response Format

The following outline should be followed when responding to the RFP:

- Executive Summary
- Vendor Profile
- Functional Requirements
- Technical Requirements
- Implementation and Support
- Training
- Appendices containing any additional / supporting information

Please submit the response in PDF or Microsoft Word format.

Response Questions

Questions regarding the RFP should be directed, via e-mail, to the following contact by January 27, 2014 at 5pm CT.
Tony Seiden
TSeiden@pcsedu.org

Responses to all questions received will be returned to all vendors. Vendor names, where mentioned, will be left out.

RFP Timeline

Perspectives Charter Schools has established the following timeline in relation to the Student Information System RFP. Please note that dates are subject to change. Vendors will be notified, via an addendum to this RFP, of any changes in the timeframe.

RFP distributed	January 13, 2014
Deadline for questions submitted in relation to RFP	January 27, 2014
Deadline for receipt of RFP responses	February 3, 2014
Short list of vendors determined and notified	February 10, 2014
Onsite vendor demonstrations	February 17 to February 21, 2014
System implementation (estimated)	March 3, 2014

Evaluation Criteria

The following criteria will be utilized when evaluating your response to the Student Information System RFP. This is not to be considered an inclusive list.

- Organization's experience in this space
- Customer references
- Support methodology
- Response to functional requirements
- Response to technical requirements
- Implementation complexity

VENDOR PROFILE

Vendor Experience and Qualifications

- 1. Provide a brief (1-2 paragraphs) background of your organization, including the year it was founded.**
- 2. Provide a brief (1-2 paragraphs) background of the solution you are proposing.**
- 3. Provide the percentage of your total annual revenue that is driven by enterprise content management (ECM) related revenue (e.g., software, services, maintenance, etc.).**
- 4. What percentage of your revenue is derived from the following:**
 - Software License Fees**
 - Maintenance Fees**
 - Professional Services / Consulting**
 - SaaS Revenue**
- 5. Provide evidence of what your organization is doing to remain a viable and stable player in the ECM market.**
- 6. Describe the financial stability of your organization. If available, include documentation depicting this stability.**
- 7. What is the annual research & development (R&D) investment for the ECM solution being proposed, both in terms of financial investment and total number of employees dedicated to the R&D function?**
- 8. How much of your R&D is the result of customer requests (enhancement, new functionality)?**

Vendor Strategic Partnerships

- 1. Describe your partnership with Microsoft from a product, technology, and business perspective.**
- 2. Describe your relationship with SchoolReach, Infosnap, Revtrak and Salesforce.**

Personnel

- 1. Provide the current number of employees dedicated to the solution you are proposing.**
- 2. How many of your employees work in the following areas:**
 - Sales and Marketing
 - Product Development
 - Client Service
 - Client Support
 - Other (Describe)
- 3. Provide the number of offices and their locations for your organization.**
- 4. Provide statistics related to the number of employees your company has added over the past five (5) years.**
- 5. Have you had to lay off any employees? If so, when and how many?**
- 6. Provide the average employee tenure for your Technical Support team.**
- 7. Provide the longevity, in terms of years, of your executive management team, particularly your CEO and CTO.**

Competitive Analysis

- 1. List any of the relevant independent student information system vendors**
- 2. Describe what generally differentiates you from your key competitors.**
- 3. Describe your market share in the SIS space.**

References

1. How many organizations have implemented your solution overall?
2. How many organizations are still running your solution with active maintenance and support contracts (i.e., lifetime customer retention)?
3. Provide the name of the oldest, active customer of your solution.
4. How many organizations have implemented your solution in the past fiscal year?
5. How many customers were added in the past three (3) fiscal years?
6. Describe your customer retention.
7. Describe the customer industries you service.
8. Provide information in relation to three (3) customers who have implemented a solution similar to Perspectives Charter Schools. Include company name, location, inception date, and solution specifics.
9. Would you be willing to host our organization for a site visit at your corporate headquarters?

Student Information System Requirements – System Features/Security

1. Provide a list of standard PC and Mac browsers that are currently supported.
2. List all client add-ons required for the application to function.
3. List all server add-ons required for the application to function.
4. List all modules in your system with a brief functionality description. Indicate whether each listing is part of a base package or whether it is an addition.
5. List all third-party packages with which your system currently interfaces.
6. Describe to what extent your system tracks date/time and user for data changes. Be specific with which data tables and fields are tracked and how readily available the audited information is to a district level user.
7. Describe in detail your system's security methodology and what is required for a user to access a different school. Describe whether system provides automated interfaces to security.
8. Describe your system's ability to be customized by fields, screens and reports. Are their limitations? Can changes be implemented dynamically? Describe how districts define edits on fields; what types of edits are supported; explain limitations.
9. Do client customizations survive the release upgrade process?
10. Describe the upgrade process and any tools provided to assist with upgrading the application software to a new version or release. What role, if any, does the offeror play during the upgrade for all support structures?
11. Describe the proposed system's ability to utilize mobile devices. List which devices are supported and describe any limitations. Include descriptions of any mobile apps available as well as use of standard applications on these devices.
12. Describe whether system provides automated interfaces to security.
13. Describe what system processes require all users to be offline, if any.
14. Describe vendor's approach to purging historical data and whether any automated processes exist.
15. Describe the proposed system's ability to allow user access to multiple years of data.
16. Describe the system's ability to export data. Are there any limitations as to specific fields or types of data that can be exported? Do you provide a data dictionary that contains this information?
17. Describe the system's ability to import data, including (but not limited to) demographics, historical grades and test scores.

Student Information System Requirements – Enrollment/Demographics

- 18. Describe system's capabilities to display separate fields for house number, street direction, street names, apartment number, city, state and zip + 4.**
- 19. Describe system's capabilities to display separate fields for name suffixes and/or allow administrative users to manually create custom fields for entry of demographical information.**
- 20. Describe system's capabilities to house multiple addresses and guardians for an individual student, including options to create rules/notes to accommodate family requests (ex. Parent B should not receive communication from the school).**
- 21. Describe system's capability to provide user alert for possible duplication of student data. What data elements trigger possible duplicates? Describe system's capability to merge two duplicate student records for all data.**
- 22. Describe system's ability to display all service area types for students (Special Education, Homeless, ELL, etc.). Identify all screens where information is displayed.**
- 23. Describe the process for transitioning students to next grade and next school for end of year.**
- 24. Describe the proposed systems online registration for parents and whether it is part of the core product. If not available, does the system have any limitations in integrating with third-party vendors (ex. Infosnap, Smart Choice, etc.)?**
- 25. Describe the proposed systems online application for new families and whether it is part of the core product.**
- 26. Describe the system's ability to link siblings/related-students within the same household, regardless of school.**
- 27. Describe any of the system's capabilities to establish rules for data entry in text box fields to prevent the entry of erroneous data (ex. accidental entry of letters in a home phone field or entry of numbers in a name field).**

Student Information System Requirements – Scheduling

28. Describe what data can transfer with a student when a schedule changes a student's classes.
29. Describe system's capabilities to schedule pull-out classes for SPED/ELL. Can you itemize a schedule for students within a specific section (example: Gen-Ed students take a 90 minute block of Math, but a SPED student only spends the first 45 minutes in the same section, before joining a pull-out class for the second 45 minutes. Describe the attendance procedure in this instance.
30. Describe how proposed system associates multiple teachers to a single class.
31. Describe how proposed system allows for changes to a class schedule mid-year and maintains historical data within the section (ex. Algebra I section meets in P1 M-F during S1, then moves to P2 M-R in S2).
32. Describe proposed system's ability to schedule afterschool programs to track attendance internally (outside of ADA/State Reporting),

Student Information System Requirements – Attendance

- 33. Describe in detail the options available for calculating daily attendance and the tables where this information is stored.
- 34. Describe how system prevents teachers from updating attendance once front office updates record.
- 35. Describe if the proposed system has the ability to specify the number of previous days' attendance teachers can update
- 36. Describe if the proposed system allows District Administrator to have the ability to view or run daily and/or period absence report for entire district at one time.
- 37. Describe in detail how absence records are handled when a withdrawal for a student occurs and attendance records exist after that date.
- 38. Describe proposed system's aggregated attendance reports available from district-level to student-level.
- 39. Describe if proposed system provides both district level and school level aggregated report of average daily attendance.
- 40. Describe proposed system's ability to generate various attendance letters based on number of days absent. Does it allow district to define type of attendance (excused or unexcused) that is to be used for calculation of letters?
- 41. Describe proposed system's ability to scan student IDs and automatically update attendance, including time of arrival, assigning tardy codes and calculating minutes in attendance.

Student Information System Requirements – Grading

- 42. Describe the available GPA calculations and the ability to control at the district level.
- 43. Will GPA calculate and store historical grades for each individual term (Q1, Q2, Q3, Q4, S1, S2)?
- 44. Describe the available GPA calculations which appear on the individual student screens (both for admin and student/parent portals). Can multiple GPA calculations appear on individual student screens and report cards?
- 45. Describe system's administrative reports available for teacher grading analysis, including teacher gradebook reports and grades distribution reports.
- 46. Describe system's parent notification system capability for when a student's grade drops below an established threshold (ex. Email/text home after grade in one or more classes drops below a 70%). If available, will parents also be notified once the grade has been raised above a preset threshold?

Student Information System Requirements – Reports

- 47. Describe any graphical reports available in the system (charts, tables)
- 48. Describe any built-in dashboard features, combining various data points for both individual students and school/district-wide (attendance, grading, testing, disciplines, etc.). See "Dashboard Example" tab for the types of data we would like to see graphically within the system.
- 49. Describe proposed system's ability for option to print, view or export to a file.
- 50. Describe the proposed system's ability for district power users and end users to create custom reports and publish within the application.
- 51. Describe any data element limitations proposed system has within the report writer.
- 52. Describe the report writer's ability to schedule reports and how it routes the reports to groups of users.
- 53. Describe the proposed system's ability to use SQL to create reports.
- 54. Describe the proposed system's ability to set parameters and generate student-athlete eligibility reports on a recurring basis.

Student Information System Requirements – Parent/Student Access

- 55. Parent/student access provides real-time data from the teacher's gradebook.
- 56. Describe how the proposed system manages user IDs and passwords. Does it allow automatic creation of logins and the ability to mass import? Do students and parents have the ability to generate their own.
- 57. Describe if the proposed system permits parents to reset and manage passwords independently.
- 58. Describe if the proposed system uses client's email software or whether it uses an internal messaging system.
- 59. Describe how a district controls what a parent has access to.
- 60. Describe in detail whether a student's access is managed differently than parent's access.
- 61. Describe how the proposed system identifies and purges unused accounts.
- 62. Describe if the proposed system provides parents the ability to make online changes to address, phone, email, etc.) Does it require validation by school personnel?

Student Information System Requirements – Teacher Gradebook

- 63. Describe if the proposed system is a real-time, web-based gradebook and classroom management module. Describe the integration of the gradebook with the core product. Does a schedule change for a student automatically appear within the gradebook? Is there an alert to draw attention to the change?
- 64. Describe how the proposed system stores teacher preferences (assignment types, assignment weights) and what steps are necessary to change these values if the class is assigned a different teacher.
- 65. Describe how the proposed system supports district-wide weighting for courses. Can the same course be itemized by campus (ex. Algebra I is a .5 credit/semester course at one school, but a double-period 1 credit/semester course at another school)?
- 66. Describe how proposed system's ability to setup district-wide defaults within gradebook that are protected against change by teacher.
- 67. Describe if the proposed system provides an option to mass assign grades for all or some students by assignment.
- 68. Describe if proposed system provides an option to allow course assignments within the gradebook to be copied.
- 69. Describe how the proposed system provides access (maintenance or inquiry) to authorized school administration. Also describe how long-term substitutes are given temporary access to the assigned teacher's gradebook.
- 70. Describe proposed system's ability to link assignments with standards. Include detailed description of how an assignment that covers multiple standards would be grades with one or more standards based values in addition to an overall numeric value.
- 71. Describe whether proposed system provides ability to attach resource links to assignments for student/parent access.
- 72. Describe how system provides inquiry access to student grades to students such as Athletic Coaches, Mentors, Department Chairs, etc.

Student Information System Requirements – Discipline

- 73. Describe how a discipline referral submitted by a teacher flows into the incident reporting process in the admin portal.
- 74. Describe reports currently available in your solution that report district wide information concerning discipline incidents.
- 75. Describe how proposed system supports single event tracking with multiple students and/or multiple infractions.
- 76. Describe whether the proposed system alerts the user or limits the user to assigning more than 10 out-of-school suspension (OSS) days or the accumulation of 10+ days when a student is defined as having an Individualized Education Plan (IEP). Does this feature accumulate OSS days across all schools for the year?
- 77. Describe how the proposed system blocks a student from being enrolled anywhere within district if student has been identified as Expelled.
- 78. Describe how proposed system updates attendance when an OSS is assigned.

- 79. Describe how the proposed system links local codes to State and Federal reporting codes. Include details as to how specific codes or combinations of specific codes can determine whether reportable.
- 80. Describe proposed system's ability to define and track Due Process Hearing dates and results.
- 81. Describe proposed system's merit/demerit tracking and notification capabilities (ex. Student acquires his 10th demerit which leads to a 1 day OSS. Can the system use logic to know when to assign a student a suspension once they've gone above the threshold)? Can the system notify parents via email/text when a discipline event has been recorded?
- 82. Describe proposed system's ability to allow customization to merit system (ex. Create a merit system which awards or subtracts points or play money based on merits/demerits and accumulates in each student's account).

Student Information System Requirements – State Reporting

- 83. Describe the proposed system's role in identifying State reporting changing. Describe how your system is compliant with Illinois state reporting requirements. Describe how new data elements or changes to how data is reported is communicated to districts.
- 84. Describe the proposed system's ability to view previous years of state reported data.
- 85. Describe the system's workflow to collect Special Education data from an external software package that is required for State Reporting.
- 86. Describe how scheduling/teacher data is extracted to provide for Teacher Certification reporting.

Student Information System Requirements – Student Fees

- 87. Describe the proposed system's structure for recording lunch transactions, income status (free, reduced, paid). When a student's lunch status is changed, does the system have the capability to make retroactive changes to previous transactions?
- 88. Are student fees and/or lunch transactions purged from the system during the end of year process or are they always accessible historically?
- 89. Describe the proposed system's capability to handle online fee payments from parents or administrative staff. If not available, does the system have any limitations in integrating with any third-party payment vendors (RevTrak, School Payment Solutions, etc.)?

Student Information System Requirements – Assessment Data

- 90. Describe the proposed system's load, matching and cleansing process for standardized assessments. Explain in detail how the matching criteria can be defined by the district.
- 91. What assessments does your application support? Detail your recommendations as to which should be loaded to the SIS and why.
- 92. Describe how the proposed system gets modified when a standardized test file layout changes. Include details on whether process is manual, whether wizards exist or whether the offeror makes these changes as part of offeror support.

Student Information System Requirements – Counselor Tools

- 93. Describe how courses are defined as meeting specific graduation requirements. Include details on how matching is done to make sure a full year of a course is used instead of two 'A' semester courses"
- 94. Describe the proposed system's methodology when identifying students that are deficient/not on track, as it relates to graduation.
- 95. Does the system include required graduation assessments within the calculation and does it include current courses?
- 96. What reports are available to identify those not on track?
- 97. Describe the proposed system's available reports that identify duplicate grades/schedules.
- 98. Describe how system ensures that World Language graduation requirements are satisfied with two years of the same world language, not two units of two different languages.
- 99. Describe how system differentiates graduates from non-graduates. Also describe the available resources for tracking college/career planning and alumni.
- 100. Describe whether proposed system includes a four-year plan module and what reports are available for schools to run over this module.

Student Information System Requirements – Miscellaneous

- 101. Describe proposed system's parent notification capabilities in detail (text and email).
- 102. Describe proposed system's ability to schedule afterschool programs to track attendance internally (outside of ADA/State Reporting).
- 103. Describe system's ability to handle Summer School. Can attendance be taken outside of ADA? Does it store summer school classes differently? Does it conflict with the end of year process?
- 104. Does proposed system have the capability to accept online applications and facilitate a lottery for the next school year (with the current year still in session)?
- 105. Does proposed system store and maintain historical lunch transactions. Does any data get purged with the end of year rollover?

Student Information System Requirements – Training and Support

- 106. Describe system's various online training tools provided within the application. Include in detail any available training wizards.**
- 107. Describe offeror's support structure. Include detail on how problems are communicated and how issues are escalated for quick resolution.**
- 108. Describe the customer support available to all users. Can any user contact support via phone/email/online chat or is the client restricted to a small number of administrative accounts?**
- 109. Describe how decisions are made concerning client requested enhancements to core package. Include details on how requests are submitted.**