



90 Canal Street, Suite 600
Boston, MA 02114

DATE: May 25, 2016

**REQUEST FOR PROPOSALS:
UP EDUCATION NETWORK BEHAVIOR AND COMMUNICATIONS INFORMATION SYSTEM PROVIDER**

PART I: SUBMISSION REQUIREMENTS

1. Please return all price proposals and product proposals separately in TWO SEALED envelopes to UP Education Network
2. Please include in your sealed proposals a description of how you will meet the specifications outlined in Part II of this document. Please include the price for goods and services as listed on pages 5-6 of this document.
3. Please include in your sealed product proposals a certification of non-collusion (otherwise known as a certification of good faith). Please see a sample of this form in Part III of this document.
4. Sealed proposals must be delivered to UP Education Network, 90 Canal St Suite 600, Boston MA, 02114 no later than 5pm on June 8, 2016. Please mark sealed envelopes as:

TO: UP Education Network

FROM: [Name of Bid Respondent]

**RE: UP EDUCATION NETWORK BEHAVIOR AND COMMUNICATIONS INFORMATION
SYSTEM PROVIDER RFP**

DATE / TIME SUBMITTED:

Please also indicate whether the sealed envelope is the price or product proposal.

5. Please feel free to use the checklist in Part IV to ensure you have met all submission requirements. This checklist is NOT required and does not have to be included with the sealed bid, but may be included if you prefer.

**PART II: PURCHASE DESCRIPTION (SCOPE OF SERVICES), EVALUATION CRITERIA AND RULE FOR
AWARD– SEE ATTACHED**

PART III: CERTIFICATION OF GOOD FAITH (NON-COLLUSION FORM) – SEE ATTACHED

PART IV: RFP CHECKLIST – SEE ATTACHED

DATE: May 25, 2016

**REQUEST FOR PROPOSALS:
UP EDUCATION NETWORK BEHAVIOR AND COMMUNICATIONS INFORMATION SYSTEM PROVIDER**

**PART II: PURCHASE DESCRIPTION (SCOPE OF SERVICES), EVALUATION CRITERIA AND RULE FOR
AWARD**

We are inviting vendors to submit sealed proposals for a behavior and communications management system to serve the schools managed by UP Education Network. The following specifications describe the product, services and qualifications that UP Academy schools seek from their provider. Whether vendors can provide the features listed below will be the evaluation criteria used to determine whether bidders are responsive. A proposal that scores "Unacceptable" in any of the below categories will not be considered for award.

Behavior Management System

UP Education Network requires the system to support our complex behavior management system, including:

- The ability to enter 'merits' and 'demerits' in an *extremely* efficient manner
- The ability to enter and track referrals out of class, including tracking which students are out of class at any given time
- The ability to enter and track behavior incidents, including the ability to award multiple consequences for a single incident , to track behavior hearings and to generate suspension letters as required by MA state regulations
- The ability to customize consequence types
- The ability to create arbitrary, customized relationships between consequences, student rosters, student lists and communications
- The ability to integrate student attendance and grade information from multiple external sources
- The ability to create points bank scores that aggregate behavior, attendance and homework information into a single weekly score and generate a custom PDF to communicate points bank scores

Scoring Criteria:

Highly advantageous:

- Ability to track behavior hearings and to generate suspension letters as required by MA state regulations
- The ability to track which students are out of class at any given time
- The ability to create arbitrary, customized relationships between consequences, student rosters, student lists and communications

Advantageous:

- The ability to create points bank scores that aggregate behavior, attendance and homework information into a single weekly score and generate a custom PDF to communicate points bank scores
- The ability to enter and track behavior incidents, including the ability to award multiple consequences for a single incident

Not advantageous:

- The ability to enter 'merits' and 'demerits' in an *extremely* efficient manner
- The ability to enter and track referrals out of class
- The ability to customize consequence types

Unacceptable:

- Unable to integrate student attendance and grade information from multiple external sources
- Unable to achieve 'Not advantageous' metrics

Communications

UP Education Network requires the system to support complex communications between families, staff and students

- Management of student, parent, and household contact information, with the ability for all users to enter in multiple contact information points for each student and to customize how each point of contact is defined (ie, create a customized field for "Childcare provider")
- Ability to generate notifications for super-users when contact information is edited
- Log of communications between staff with families, staff with students, and staff with other staff, including the ability to flag communication for follow up
- The ability to trigger text messages and emails to students/families based on arbitrarily complex, user-defined algorithms
- The ability to send one-off text messages and email to students/families
- A system for tracking information related to student participation in athletics/extracurricular activities
- A system for managing student rosters during after-school programming and summer programming
- A system for managing tickets created by staff that other staff need to resolve
- The ability to track coaching interactions with staff

Highly advantageous:

- Ability to generate notifications for super-users when contact information is edited
- The ability to trigger text messages and emails to students/families based on arbitrarily complex, user-defined algorithms
- A system for managing tickets created by staff that other staff need to resolve
- The ability to track coaching interactions with staff

Advantageous:

- Log of communications between staff with families, staff with students, and staff with other staff, including the ability to flag communication for follow up
- The ability to send one-off text messages and email to students/families

Not advantageous:

- Management of student, parent, and household contact information, with the ability for all users to enter in multiple contact information points for each student and to customize how each point of contact is defined (ie, create a customized field for "Childcare provider")
- A system for tracking information related to student participation in athletics/extracurricular activities
- A system for managing student rosters during after-school programming and summer programming

Unacceptable:

- Unable to meet 'Not advantageous' criteria

Reporting

We require access to comprehensive reporting on student performance (both individual and by student cohort). Reports should be user-friendly and should enable administrators and teachers to identify and address patterns in student behavior. The system should have a customizable dashboard that allows for a quick review of the state of the school. UP requires access to all behavior and communications data via a RESTful API.

Scoring Criteria:

Highly advantageous:

- Full REST API access and ability to contribute to report designs

Advantageous:

- REST API with access to all data entered by staff

Not advantageous:

- REST API with partial data access

Unacceptable:

- No REST API

Experience

We would like our vendor to have demonstrated experience working with high performing schools, both charter and district schools, with similar demographics to our schools. This includes populations with a significant number of students that qualify for free/reduced price lunch, English Language Learners, and students with disabilities. Vendors should have demonstrated success, as defined by comparisons between on or at grade level scores and statewide test proficiency levels. In addition, please submit 3 references.

Scoring Criteria:

Highly advantageous: Vendor has experience working with high performing charter schools and district schools with similar demographics to UP Academy. Vendor has demonstrated significant success working with such schools. Vendor has submitted 3 references.

Advantageous: Vendor has experience working with high performing charter schools. Vendor has demonstrated moderate success working with such schools. Vendor has submitted 3 references.

Not advantageous: Vendor has demonstrated moderate success working with schools. Vendor has submitted 3 references.

Unacceptable: Vendor has not demonstrated success working with schools. Vendor has not submitted references.

Professional Services

UP Education Network requires that the quote includes professional services, including:

- A dedicated account representative from the vendor to address issues as they come up and to provide any support that is needed
- Access to software engineers as needed
- Access to service call ticket or tracking system
- A system for regularly checking the quality and integrity of the data, and for resolving any duplicate data entries that ensures that issues are resolved at least once every 24 hours

Information about schools to be served

- Location: Boston, Lawrence and Springfield.
- Student Population: Our schools are a combination of middle schools serving grade 6-8, PK-8 schools and elementary schools serving grades PK-5..

- For additional information regarding the specific needs of each school that may be helpful in putting together a response, as well as school calendars and proposed training dates, respondents should feel free to contact Cynthia Beltre, School Finance Coordinator, at cbeltre@upeducationnetwork.org. This contact is not required but is optional.

RULE FOR AWARD

The contract will be awarded to the responsive and responsible bidder who receives the LOWEST composite score according to the scoring rubric defined below.

Any proposal that is not submitted by the deadline or that does not include a certificate of non-collusion will not be accepted.

If a proposal receives a score of "unacceptable" in any of the quality requirements, that proposal will not be accepted.

Scoring Rubric:

Each section of the non-price proposal and price proposal will receive points according to the rubric below. A composite score will be calculated based on the points earned in each section and the following weighting:

- Behavior: 30%
- Communications: 15%
- Reporting: 10%
- Experience: 5%
- Price 1: 20%
- Price 2: 20%

Non-Price Proposals:

Each element of the non-price proposal will receive a score of Highly Advantageous, Advantageous, Not Advantageous, or Unacceptable, according to the specifications laid out in the purchase description. Vendors will earn the following points based on the evaluation of the non-price proposal:

Highly Advantageous	1
Advantageous	2
Not Advantageous	3
Unacceptable	N/A; proposal will be rejected

Price Proposals:

Price proposals should be presented as follows:

Component 1: Year 1 costs

- Cost of Year 1 Services: This should be presented as a **TOTAL** price based on:
 - UP Academy Boston – 450 students
 - UP Academy Dorchester – 750 students
 - UP Academy Holland – 720 students
 - UP Academy Oliver – 360 students
 - UP Academy Leonard – 360 students

- UP Academy Kennedy – 480 students
- Total: 6 schools and 3,120 students

Component 2: Year 2-3 costs

- Costs for Years 2-3 should be presented using a formula that would allow UP to calculate the price under various growth scenarios. The growth scenario used for evaluation will be:
 - Year 2:
 - UP Academy Boston – 500 students
 - UP Academy Dorchester – 750 students
 - UP Academy Holland – 720 students
 - UP Academy Oliver – 360 students
 - UP Academy Leonard – 360 students
 - UP Academy Kennedy – 500 students
 - UP Academy LVII – 450 students.
 - Total: 7 schools and 3,650 students
 - Year 3:
 - UP Academy Boston – 500 students
 - UP Academy Dorchester – 725 students
 - UP Academy Holland – 720 students
 - UP Academy Oliver – 360 students
 - UP Academy Leonard – 360 students
 - UP Academy Kennedy – 500 students
 - UP Academy VII – 450 students.
 - UP Academy VIII – 450 students
 - UP Academy IX – 450 students
 - UP Academy X – 450 students
 - Total: 10 schools and 5,000 students
 - Note that the actual number of schools/students will be different from what is listed above.

Both components of the price proposal will be ranked separately from 1 to the number of bidders, with 1 being the lowest priced proposal.

Proposals' total score will be calculated using the following table:

Category	Score	Weight	Total
Behavior		30%	
Communications		15%	
Reporting		10%	
Experience		5%	
Price 1		20%	
Price 2		20%	
TOTAL			

The contract will be awarded to the proposal that receives the **LOWEST** total score.

Contracts will be awarded by the Chief Operating Officer of UP Education Network.

MODIFICATIONS OR WITHDRAWALS

Any bidder that wishes to withdraw a proposal must do so in writing. In addition, any corrections or modifications to bids must be submitted in writing in a sealed envelope prior to the bid deadline of 5pm, June 8, 2016.



90 Canal Street, Suite 600
Boston, MA 02114

Should you have any additional questions about this invitation for bid or the specifications we seek from our literacy assessment provider, please do not hesitate to contact me.

Sincerely,

Cynthia Beltre
School Finance Coordinator
cbeltre@upeducationnetwork.org



90 Canal Street, Suite 600
Boston, MA 02114

PART III: CERTIFICATION OF NON-COLLUSION

The undersigned certifies under penalty of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

(Signature of individual submitting bid)

(Name of business)

PART IV: RFP REQUIREMENTS CHECKLIST

Please feel free to use this checklist to ensure you have addressed all aspects of the RFP requirements.

- Include in your proposals a description of how you will meet the specifications for the following components of the RFP:
 - Assessments and Related Tools
 - Reporting
 - Professional Services
 - Experience
- Include the price as listed on page 5-6 of this document.
- Include in your sealed bids a certification of non-collusion.
- Place all bid documents in TWO SEALED envelopes.**
- Mark sealed bid envelopes with:**
 - **TO: UP Education Network**
 - **FROM: [Name of Bid Respondent]**
 - **RE: UP ACADEMY BEHAVIOR AND COMMUNICATIONS INFORMATION SYSTEM PROVIDER RFP**
 - **DATE / TIME SUBMITTED:**

Please also indicate whether the sealed envelope is the price or product proposal.

- Deliver sealed bids to UP Education Network, 90 Canal Street Suite 600, Boston MA, 02114 no later than 5pm on June 8, 2016.**