

**SUPPLIER DIVERSITY MANAGEMENT &  
COMPLIANCE SOFTWARE SOLUTION  
REQUEST FOR PROPOSAL (RFP)**



**Expect  
great  
things.**



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## SUPPLIER DIVERSITY MANAGEMENT & COMPLIANCE SOFTWARE SOLUTION

### INTRODUCTION

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#### ○ **ABOUT THE PITTSBURGH PUBLIC SCHOOLS**

The Pittsburgh Public Schools ("District") offers a wide variety of educational options and offerings for our diverse student body. We aim to provide options that not only match our students' passions and unique needs, but also help to prepare them for the real world through diverse experiences.

As the largest of 43 school districts in Allegheny County and second largest in Pennsylvania, Pittsburgh Public Schools serves approximately 21,000 students in Kindergarten through Grade 12 in 54 schools. In addition, Early Childhood programs serve 1,614 three- and four-year-olds in classrooms across the District.

#### ○ **DISTRICT VISION**

All students will graduate high school college, career and life-ready prepared to complete a two-or four-year college degree or workforce certification.

#### ○ **DISTRICT MISSION**

The Pittsburgh Public Schools will be one of America's premier school districts, student-focused, well-managed, and innovative. We will hold ourselves accountable for preparing all children to achieve academic excellence and strength of character, so that they have the opportunity to succeed in all aspects of life.

### PURPOSE

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The purpose of this Request for Proposal ("RFP") is for the Pittsburgh Public Schools to procure and fully implement a Supplier Diversity Management & Compliance Software application with a vendor-hosted web-based software system. This system will provide automated reporting and monitoring of diversity spend and integrate all procurement projects based upon the District's Eligible Business Enterprise (EBE) Policy and operating procedures.

The Pittsburgh Public Schools supplier diversity initiative and oversight are coordinated through its Minority/Women Business Department.

The District seeks a partner to assist the Pittsburgh Public Schools with planning and executing an implementation project from our current to a next generation software product. The software product will support the District's Minority/Women Business Department staff, as well as all other District departments engaged in identifying diverse Proposers in contracting.

The software solution should include such functionalities as the following:

- Vendor Management
- Goal Setting/Availability Analysis
- Project Management
- Contract Compliance
- Diverse Spend Tracking & Analysis
- Reporting
- Outreach Management

The solution must be a completely hosted solution in order to keep the system fully functional.

The software program must allow for the tracking and monitoring of tier 1 and tier 2 Minority, Women, and/or Disadvantaged Business Enterprise (MBE/WBE/DBE) participation associated with business and workforce utilization metrics. The existing program is currently tracked partially by an outdated and unsupported compliance software system as well as manually. The manual processes are performed by the Minority/Women Business staff. The District intends to migrate data from its current compliance software system into the newly hosted solution.

The software solution provided must be fully hosted and maintained by the submitting Proposer, and include any and all required software, licenses, support services, training in its best use (both end-user and application administration), and application configuration required to make the system fully functional and useful to the District.

Our successful Proposer should be prepared to provide development, integration, migration, training and ongoing support for a duration of at least five (5) years after the system goes live and is expected to be renewable annually thereafter, subject to mutual agreement, as well as funding, appropriation, and approval by the District Board of Directors. The solution must integrate with our current ERP System (MUNIS) and any future platforms that are utilized throughout the District.

The successful Proposer will be required to migrate data from the existing system (Outreach Manager) and establish and maintain required integrations and compatibility with MUNIS. The software must interface with MUNIS to obtain prime contractor contact and payment data and well as contract information. The procured system is expected to provide a platform/service to obtain sub-contractor payment data from the prime contractors/consultants and update the sub-contractor utilization by contract and overall spend automatically.

User categories include the District's:

- Minority/Women Business Department Staff (principally)
- A Technology Lead/Team
- Prime Contractors
- Sub-Contractors

## SCOPE OF WORK

The implementation of a software solution for monitoring, tracking and evaluating the inclusion and compliance of Minority, Women, Disadvantaged Business Enterprise firms (M/W/DBE) will enable the District to:

- I. Retire its current, outdated system.
- II. Closely align with the requirements of CFR 49 Part 26, as outlined by the U.S. Department of Transportation's DBE Program guidelines.
- III. Allow for real time monitoring that encourages adherence to the District's policies and expectations.
- IV. Generate timely and accurate reports documenting the District's utilization of Minority, Women, Disadvantaged and 8(a) certified Business Enterprise firms, collectively referred to as Eligible Business Enterprises (EBEs).
- V. Reduce Minority/Women Business Department staff time devoted to manual processes.
- VI. Provide a monitoring and tracking tool for the District's departments that allows ongoing project review.
- VII. Maintain historical contract utilization data.
- VIII. Provide contracting data necessary to prepare for potential Disparity Study availability tables.
- IX. Provide automated targeted business directories and generate bidders lists.
- X. Generate opportunity alerts via the web-based application.
- XI. Update the current tracking and monitoring process consistent with industry trends.
- XII. Share contractor data with internal and external stakeholders that implement and operate diversity inclusion programs and contract with diverse contractors.

While interfacing with the District's MUNIS platform, the proposed solution shall enable the indicated users to perform the following activities:

### ADMINISTRATION:

	<b>Requirement</b>	<b>Impacted Users</b>
1	Create users, delete users and grant levels of access rights.	MWBD Staff
2	Set restriction levels for access to contractor payment information based on user profile.	MWBD Staff
3	Set restriction levels for access to reports based on user profile.	MWBD Staff

### CONTRACTOR MANAGEMENT:

	<b>Requirement</b>	<b>Impacted Users</b>
1	Create prime contractor and sub-contractor accounts. Information to be captured shall include Tax ID, contractor name and description, insurance information, contact information, web address, etc.	MWBD Staff or Technology

## SUPPLIER DIVERSITY MANAGEMENT & COMPLIANCE SOFTWARE SOLUTION

2	Modify contractor status when needed (Active/Inactive/Certified/Non-Certified).	MWBD Staff
3	Delete or update contractor information in real time.	MWBD Staff
4	Perform an online search for contractor information using different parameters.	All Users
5	Enable the sharing of Proposer information with internal and external stakeholders.	MWBD Staff
6	Create a directory of all diverse firms that can be posted online and searched by anyone.	MWBD Staff
7	Track all communications and activities tied to each contractor including desk and field audits.	All Users

### CONTRACT PAYMENT ENTRY/ MONITORING:

	Requirement	Impacted Users
1	Enter sub-contractor payment data.	Primes
2	<ul style="list-style-type: none"> <li>Upon entry of sub-contractor payment data, trigger an email notification to the District's MWBD staff and to the sub-contractor(s). The contract compliance number shall be used to identify the department, or staff, and sub-contractors to receive the email notification.</li> <li>The email notification shall contain a summary of the payment information for the sub-contractor that was provided by the prime contractor.</li> </ul>	Prime Contractors & MWBD Staff
3	Upon receipt of the email, the sub-contractor shall electronically confirm or deny the payment information and submit feedback to the District's MWBD staff.	Sub-Contractors
4	Interface to the District's MUNIS system to extract prime contractor payment data.	Vendor & Technology Team
6	Upon receipt of feedback from sub-contractor, review and verify the sub-contractor's payment information in the system.	MWBD Staff
7	Enforce the verification of payment information to all sub-contractors identified to meet the EBE goal before a payment can be approved and released to the prime. <b>CRUCIAL</b>	MWBD Staff
8	Approve sub-contracting payment information. This shall update the payment status.	MWBD Staff

### DATA INTEGRATION & MIGRATION/TRAINING: Proposer shall be responsible for the following:

	Requirement	Impacted Users
1	<ul style="list-style-type: none"> <li>Provide training and training materials for District staff</li> </ul>	MWBD Staff & Technology
2	<ul style="list-style-type: none"> <li>Integrate and migrate existing data into the new system</li> <li>Establish workflow for MUNIS integration</li> </ul>	MWBD Staff & Technology

**REPORTING:**

	<b>Requirement</b>	<b>Impacted Users</b>
1	Generate standard and ad hoc reports including the following: <ul style="list-style-type: none"> <li>• Payment history reports for prime and sub-contractors</li> <li>• The District's monthly, quarterly and annual utilization reports and others as required by MWBD Staff</li> <li>• Other payment information using various parameters including procurement categories, race-conscious/neutral, departments</li> <li>• Diverse spend for non-contract expenditures such as P-Card and purchase orders</li> </ul>	MWBD Staff & Technology
2	Measure and track commitment vs. actual diversity spend e.g.: <ul style="list-style-type: none"> <li>• Generate and access reports based on department</li> <li>• Generate and access reports based on procurement types</li> <li>• Generate and access reports based on certification types</li> <li>• Generate and access reports based on agenda types</li> <li>• Generate and access reports based on race-conscious/neutral types</li> <li>• Generate and access reports based on ethnicity and gender</li> <li>• Generate and access reports based on category</li> </ul>	MWBD Staff

**RESPONSE FORMAT**

One (1) original and five (5) copies of the proposal, including any/all attachments and cover letter, must be prepared and submitted by **5:00PM EST on Monday, April 18, 2022**, with "Supplier Diversity Management & Compliance Software Solution" as the subject line. In addition to the hardcopies, the original proposal should be loaded on a USB drive as a requirement to complete your submission. Please forward your proposal submission via U.S. mail or delivery service to:

**PAULA B. CASTLEBERRY**  
 Minority/Women Business Coordinator  
**PITTSBURGH PUBLIC SCHOOLS**  
 1305 Muriel Street Pittsburgh PA 15203  
[pcastleberry1@pghschools.org](mailto:pcastleberry1@pghschools.org)

Proposals must be submitted in accordance with the proposal outline detailed in this RFP.

The District reserves the right to select a proposal in its entirety or some portion(s) thereof. The District also reserves the right to reject any and all proposals, waive irregularities, and to select the proposal that is determined to be the most advantageous to the District.

Proposals submitted via email or fax will not be accepted.

## QUESTIONS

All inquiries regarding this RFP must be made in writing to Ms. Paula B. Castleberry at [pcastleberry1@pghschools.org](mailto:pcastleberry1@pghschools.org). Any verbal outreach will be redirected to submit inquiries in writing via email.

### ○ SPECIFIC REQUIREMENTS

Responses should address the following questions or requests for information and be organized so that the specific questions or requests for information each begin on a new page with the question repeated at the top of the page.

#### I. Letter of Transmittal

- A. Each proposal should be accompanied by a letter of transmittal **which** summarizes key points of the proposal, and which is signed by an authorized officer.

#### II. Proposer's Experience and Qualifications

- A. Please provide an overview of your company and its qualifications. Please include the location of the company's office(s) and identify the headquarters location as well as the nearest representative or supporting office.

#### III. Supplier Diversity Management & Compliance Software System Team

- A. Provide brief resumes or biographies for the following individuals who will be assigned to the District's solution, including any relevant experience for each individual. Please include only those individuals who will work on the District's solution including contact information.
- B. The staff member who will assume chief responsibility for managing and supporting the migration and implementation of the District's Supplier Diversity Management & Compliance Software solution.
- C. Other members of your team assigned to the project and the specific role that each can be expected to play.
- D. Team members assigned to provide training to the end users as well as our Technology staff.

#### IV. Plan of Work

- A. Please provide a detailed plan of work for the District's engagement. It should include a fee structure that your firm would propose to fully implement the Supplier Diversity Management & Compliance Software solution for the District, including migration, integration and training.

#### V. Proposer's Equal Employment Opportunity Policy/Supplier Diversity Plan

- A. Describe your company's equal employment opportunity policies and programs.
- B. Has your company or any of its employees, or anyone acting on its behalf, ever been convicted of any crime or offense arising directly or indirectly

from the conduct of your company's business or have any of your company's officers, directors or persons exercising substantial policy discretion ever been convicted of any crime or offense involving financial misconduct or fraud? If so, please describe any such convictions and surrounding circumstances in detail.

- C. Has your company, or any of its employees, or anyone acting on its behalf, been indicted or otherwise charged in connection with any criminal matter rising directly or indirectly from the conduct of your company's business which is still pending or have any of your company's officers, directors or persons exercising substantial policy discretion been indicted or otherwise charged in connection with any criminal matter involving financial misconduct or fraud which is still pending? If so, please describe any such indictments and surrounding circumstances in detail.
- D. Describe the company's experience in implementing Supplier Diversity Management & Compliance Software Systems for the past 2 years in the following categories:
  - 1. Agencies utilizing MUNIS
  - 2. Various Pennsylvania School Districts
  - 3. Any other School Districts
  - 4. Agencies utilizing the U.S. DOT's CFR 49 Part 26 for DBE firms
  - 5.

## EVALUATION CRITERIA AND SELECTION PROCESS

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The District reserves the right to request oral presentations from those firms determined to be in a competitive range and shall use the information derived from these oral presentations, if any, in its evaluation.

An Evaluation Panel will convene. The role of the Evaluation panel will be to evaluate all proposals submitted for this RFP and to make a recommendation for award. The contract will be awarded to the qualified Consultant whose proposal is most advantageous to the District. The

evaluation criteria specified below will be considered but will not be the sole factor used to determine the successful Proposer. Thus, while the points in the evaluation criteria indicate their relative importance, the total scores will not necessarily be determinative of the award. Rather, the total scores will guide the District in making an intelligent award based upon the evaluation criteria.

The District anticipates selecting one Consultant using the following criteria to determine which proposal meets the needs of the District best. The District anticipates using the following criteria:

<p><b>Section One – Qualifications &amp; Experience (20 points maximum):</b></p>	<p>The competence of the Proposer to perform the required service as indicated by the technical training, education and experience of the Proposer's personnel who will be assigned to perform the work.</p>
<p><b>Section Two - Quality and Feasibility (20 points maximum):</b></p>	<p>The quality and feasibility of the Proposer's technical specifications. The Proposer will demonstrate in its project plan how it will best meet the needs and reduce the risks of the District during the migration process. The Evaluation Panel will give points to Proposers who clearly demonstrate their compliance with the needs defined in the technical specifications. If the Proposer does not include a specific item preferred in the technical specification, the Proposer will be scored based on its ability to demonstrate how its offer meets the high-quality demands of the District.</p>
<p><b>Section Three – Ability &amp; Implementation Plan (20 points maximum):</b></p>	<p>The ability of the Proposer to perform the required service competently and expeditiously as indicated by the Proposer's workload and the availability of necessary personnel, equipment and facilities.</p>
<p><b>Section Four – Past Performance (15 points maximum):</b></p>	<p>The past performance of the Proposer as reflected by evaluations of agencies and other previous clients of the Proposer with respect to such factors as quality of work, success in controlling costs, and success in meeting deadlines.</p>
<p><b>Section Five – Supplier Diversity &amp; Inclusion (5 points maximum):</b></p>	<p>The Proposer will demonstrate their plan to include diverse vendors in the completion of this software solution and integration and/or provide proof of current certification as a diverse vendor. The Proposer will provide the demographics of its workforce, especially those who will perform on this project.</p>
<p><b>Section Six – Cost/Fee Structure (20 points maximum):</b></p>	<p>The Proposer will provide a detailed disclosure of costs and fees associated with products and services for this implementation as well as ongoing annual maintenance and support.</p>

○ **SECTION ONE- QUALIFICATIONS & EXPERIENCE**

Provide sufficient information in a clear, concise manner to the District for evaluation of the competence of the Proposer and the Proposer's personnel (as indicated by technical training, education and experience) to perform the requested services. Section One should include the following information:

- I. Proposer shall demonstrate through its background and qualifications that it is capable of providing the services described in this RFP by submitting the following information in its response:

**A. Company History/Facts**

Proposer should give a brief summary of the company's background. Please use this section to include any pertinent facts not otherwise requested.

**B. Primary Business Focus**

Please include industries served and NAICS codes if applicable.

**C. Qualifications**

A brief descriptive statement indicating the Proposer's qualifications to deliver the services requested in this RFP.

**D. Organization Size**

Provide a description of the Proposer's organization's size, longevity, and clients.

**E. Related Experience**

Provide information about the Proposer's experience with implementation and integration with other systems. Successful Proposer must have completed at least five (5) similar projects in the past three years.

**F. Project Staff Information**

The qualifications of the Proposer must be shown, including a roster of the primary staff that would be working on the project. The roster should include each individual's title, education, technical training, current position with the Proposer, and employment history. The Proposer shall also provide the percentage of time each individual will be allocated for this project.

○ **SECTION TWO – QUALITY AND FEASIBILITY**

The Proposer should demonstrate a thorough understanding of the project and how the Proposer's entire team will successfully execute the project. The score will be based on the completeness of the responses. The Proposer should make a clear presentation of how the project team is organized, their understanding of the project requirements, including the challenges and areas of risk and a detailed plan for execution.

- I. Specifically, the proposal must contain a narrative description tailored to the project, describing staff assignments and the approach the Proposer intends to take to complete the project. The proposal should identify unique characteristics of the project and the challenges those elements present as well as options to overcome those challenges.
- II. Increased value is placed on innovative concepts that may save time or money or that will lead to a more successful project. These concepts should be well conceived, clearly defined and demonstrate a thorough understanding of the project and best practices in diversity compliance management.
- III. Provide detailed information in a clear, concise manner addressing each of the technical specifications listed below. The District welcomes creative and diverse methods to accomplish this ultimate goal. In certain sections, the RFP explicitly asks for more information. In other sections, it does not. Proposer may feel free to provide any examples in its proposal that demonstrates Proposer's approach to providing the

necessary quality. Proposer should provide sufficient information for the District to analyze the project plan to meet the desired level of exceptional service. Proposer should focus on how it proposes to reduce the District's risks, to include risks of inefficient operations because of software or implementation deficiencies, cost overrun risks, and project timeliness risks.

Where appropriate, Proposer should identify such risks within the detailed scope of services section below and clearly indicate its strategy for mitigating the District's risk.

#### IV. Proposed System Overview

Describe at a high level the key benefits of the proposed system, and how it differs from competitive offerings. As part of its response to this RFP, Proposer shall provide information related to the technical platform, system architectural information, security, documentation, training, and future technical direction of product, including but not limited to:

- A. Technologies employed: Summary of technologies used by the proposed systems as it relates to this RFP. Include the software (client and server-side) components and hardware components needed for System. This section should also include commentary on any optional or extended functionality that was not included in the phase 1 requirements, but which can be used to meet future department needs.
- B. Architecture: Provide a high-level diagram and accompanying description of the architecture of the System.
- C. Release versions: Comprehensive description of the proposed systems including: release and version, a list and description of the subsystems or modules, batch processes included in the system. A description of future technical directions, improvements, and features intended for the next release.
- D. Integration, customization and extension: A description of the types of integration, customization, and extension tools which are available for the proposed products.
- E. Documentation: A description of the documentation to be included with the proposed systems including the medium (i.e. USB drive, hard copy, etc.) and number of copies.
- F. Training: A description of training programs available for the proposed systems and all training that is included in the proposal. This training should include both the required initial training to get users functional on the system as well as technical training to enable ongoing support, maintenance and extension of the system.
- G. Additional items: A description of any other items not specified in the above requests which are required to install, customize, maintain, and run the proposed system.

#### V. Hosting Services

Proposer shall provide an overview of its hosting services, addressing the following:

- A. System Availability: Describe any guarantees, or service level standards, for the

## SUPPLIER DIVERSITY MANAGEMENT & COMPLIANCE SOFTWARE SOLUTION

percent of time that the system will be available to end-users. Provide statistical information demonstrating that service availability standards have been achieved for current clients.

- B. System Security: Describe capabilities for maintaining security in the Proposer data center and ensuring that application data is protected from unauthorized access.
- C. System Integration: Describe abilities to integrate the hosted system with existing District applications, using standards-based integration tools (e.g., APIs, SSO, and/or Web Services). Include types of user authentication supported by the application with attention to single sign on services such as Azure Active Directory or Office365.
- D. Application Configuration: Describe abilities to configure and personalize the system to meet the District's specific needs.
- E. Application Updates and Enhancements: Describe schedule for updating the hosted application, and protocols used to coordinate updates with customers.
- F. Application Support: Describe the phone, e-mail, and other application support provided to customers. Describe any guarantees, or service level standards, for support response times.
- G. Service Level Agreements: Describe the service level agreement associated with the price proposal. Describe any credits or refunds offered in the event that service levels are not achieved.
- H. Disaster Recovery: In the event of a major disaster, describe capabilities (failover and redundancy) for restoring end-user access to the system and expected time frames for restoration. Also describe -the amount of data loss that can be expected in case of disaster.
  1. Service Termination: In the event the hosting agreement is terminated, describe procedures for the District to obtain its data.
  2. Implementation Plan
    - a) Explain your implementation methodology and provide an example project plan with timelines, including the anticipated start date, milestones, and deliverables. The described implementation methodology should highlight how system users will be engaged in the project in a way that increases buy-in and maximizes user adoption of the new system. Identify all necessary resources, both Proposer-provided and District-provided (from both technical and business staff), to successfully implement the system within the timeline proposed. Of particular interest is the amount of District provided IT and functional resource time you will need throughout the course of the project for tasks including but not limited to: requirements confirmation, design prototyping, acceptance testing, and training. Inclusion of the amount and expected scheduling of District-provided IT and functional resource time is of critical importance. Proposals that fail to include a fully resourced example project plan with timelines will be considered non-responsive.
  3. Training Plan and Materials
    - a) Explain in detail your company's plan to train District staff prior to

go-live and throughout the life of the contract as updates and changes happen. This plan should include the following:

- (i) Explain how you will utilize and deploy other training methods or tools to effectively assist users and Proposers.
  - (ii) Prepare user instructional documentation.
  - (iii) Hold educational and training webinars for users (prior to go-live).
  - (iv) Explain how training would be available and provided post implementation.
4. Post Go Live
- a) If available provide options for managed services that include carrying out day to day tasks and maintenance of the application.
  - b) Provide Post Go Live support options that will cover the District for the life cycle of the software\application. Support should be annual or by securing multi-year agreements.

### ○ **SECTION THREE - ABILITY**

Proposer must demonstrate the ability to complete the project as planned and on schedule.

#### I. Workload

- A. Proposer shall provide a calendar covering the proposed implementation time frame indicating periods when the Proposer has the resources available to work on the project, and periods when the Proposer will not be available to work on the project. Previous commitments do not need to be disclosed specifically but should be blocked out on the calendar. Preferred times to commence work on the project should be indicated.

##### 1. Financial Stability

- a) Proposer shall provide documentation of financial responsibility, financial stability, and sufficient financial resources to provide the scope of services to the District in the volume projected and within the time frames required. This documentation may take the form of: a letter of credit or reference from a bank or other financial institution; an insurance policy or bond; audited cash flow and balance sheet statements; and/or a satisfactory credit rating from a reputable credit rating agency.

##### 2. Disclosure

- a) Proposer shall provide a statement as to whether, in the last five (5) years, the Proposer has filed (or had filed against it) any bankruptcy or insolvency proceeding, whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors; and if so, an explanation providing relevant details. Proposer must also disclose any other relevant proceedings or factors that may threaten the Proposer's ability to complete the project, whether directed against the company directly or against its executives and/or officers.
- b) Provide detailed information in a clear, concise manner addressing the

ability of the Proposer to perform the required service competently and expeditiously as indicated by the Proposer's workload and the availability of necessary personnel and equipment. Information in Section Three should include:

- (i) How does the Proposer's current or upcoming workload impact the Proposer's ability to meet the needs of this project?
- (ii) What is the current availability of necessary personnel needed to meet the needs of this project?
- (iii) What does the Proposer offer for project team collaboration, online web meetings, process documentation and other factors that would reduce need to travel but still allow the team (District and Proposer's staff) to work together?
- (iv) Provide copies of the last two company annual financial reports; otherwise demonstrate your company's financial stability.
- (v) Has your company acquired any competitors in the last three years?
- (vi) With a growing economy and increases in software proposed adoption, how has your company responded to the increased demand for your services?
- (vii) What are your primary metrics for internal quality measurement regarding timeliness? Would you make this data available to the District?
- (viii) How often do you experience problems with the timeliness of service completion?
- (ix) What checks and balances does your company implement to ensure that work is completed on time without sacrificing quality?

#### ○ **SECTION FOUR – PAST PERFORMANCE**

Provide detailed information in a clear, concise manner addressing past performance of the Proposer as reflected by evaluations of the District, other agencies and other previous clients of the Proposer with respect to such factors as quality of work, success in controlling costs, and success in meeting deadlines:

- I. Provide customer retention rate for the last five years.
- II. Provide the average length of relationship with customers.
- III. Provide any major complaints from customers within the past five years, including lawsuits. Provide your response to said complaint. Information that identifies a client may be removed.
  - A. Explain how your company has changed your service in response to customer suggestions or complaints.
  - B. If a customer is not satisfied, what steps does your company take to make your client satisfied?
    1. Provide an explanation of how your company measures customer satisfaction. Explain how you use these measurements to analyze and improve your

performance.

- a) Provide a complete list of clients for which Proposer has provided software and implementation service(s) during the past five (5) years. This list should include at least three (3) of those entities of a similar size, complexity and scope of work, particularly governmental entities, for which these services have been performed. Service to School Districts should be highlighted.
  - (i) For the 3 similar include the following additional information: Scope of work, original total cost, original completion scheduled date, actual total cost, actual completion date, contact information, and notes as to any special circumstances for unforeseen events/additional costs incurred.

○ **SECTION FIVE – SUPPLIER DIVERSITY & INCLUSION**

Provide detailed information addressing your firm's culture of diversity & inclusion.

- I. Diversity Spend: How much money did your company spent with MBE, WBE and/or DBE firms last year? What is the percentage of your total spend?
- II. Diversity Count: What is the number of MBE, WBE and/or DBE firms that your company contracted with last year?
- III. Are you a member of any supplier diversity organizations? What is your level of involvement?
- IV. Are you a certified MBE, WBE and/or DBE firm? If so, provide proof of current certification.

○ **SECTION SIX – COST/FEE STRUCTURE**

Identify the total cost of providing the software solution including the scope of services, and itemize all costs related directly or indirectly to each component of the project, e.g. materials, cost per session, etc. Costs should include, but not be limited to, hourly or daily rates of assigned personnel, travel and per diem costs (if applicable), and cost of materials. It is expected that general, overhead, and administrative costs are included in the hourly or daily rates for labor. It will be assumed that all contingencies and/or anticipated escalations are included.

In addition to the numerical budget, please also provide a description of the assumptions underlying the proposed costs. Each line item in the cost structure should have a descriptive sentence/paragraph in the narrative.

**The District may need to request modifications to proposals to ensure that we remain within budget.**

## TIMETABLE/RESPONSE SUBMITTAL

Selection of the successful Proposer will be made based on the proposals submitted, oral interviews, and presentations. The timetable for the selection process is provided as follows:

• <b>March 18, 2022</b>	Release of Request for Proposal
• <b>April 4, 2022</b>	Final Acceptance of Questions from Proposers
• <b>April 11, 2022</b>	Responses to Questions Sent to Proposers
• <b>April 18, 2022</b>	Proposal Due Date
• <b>April 25-29, 2022 (or)</b> • <b>May 9-13, 2022</b>	Oral Interview(s) & Presentation(s)
• <b>May 25, 2022</b>	Legislative Approval by the District's Board of Directors
• <b>January 2, 2023</b>	Final Implementation – Go Live!

## GENERAL TERMS AND CONDITIONS

- I. Basis for Contract Negotiation
  - A. This RFP and the resulting Proposals shall be used as the basis for contract negotiation.
  - B. Faxed and oral proposals are not acceptable.
  - C. A Proposer's failure to submit their proposal prior to the deadline will cause their proposal to be disqualified. Late proposals or amendments will not be opened or accepted for evaluation. The Proposer is responsible for all costs associated with the preparation and submittal of their proposal.
  
- II. Proposal Modification
  - A. Written changes to submitted proposals will be accepted if received by the District prior to the proposal deadline, but only if submitted in a sealed envelope and plainly marked "**CHANGE TO PROPOSAL FOR SUPPLIER DIVERSITY MANAGEMENT & COMPLIANCE SOFTWARE SOLUTION.**" All changes received after the proposal deadline will not be opened or considered.
  
- III. Right of Rejection
  - A. Proposers must comply with all of the terms of the RFP, and all applicable local, state, and Federal laws and regulations. The District may reject any proposal that does not comply with all of the material and substantial terms, conditions, and performance requirements of the RFP.
  
  - B. Minor informalities, that do not affect responsiveness, that are merely a matter of form or format; that do not change the relative standing or otherwise prejudice other offers; that do not change the meaning or scope of the RFP; that are trivial, negligible, or immaterial in nature; that do not reflect a material change in the work; or, that do not constitute a substantial reservation against a requirement or provision

may be waived by the Minority/Women Business Coordinator. The District reserves the right to refrain from making an award if it determines that to be in its best interest.

IV. Amendments to RFP

Any clarifications or further instructions to Proposers will be sent to all Proposers in addendum form. All questions and comments regarding the information contained within this proposal must be submitted via e-mail to Paula B. Castleberry, Minority/Women Business Coordinator, at [pcastleberry1@pghschools.org](mailto:pcastleberry1@pghschools.org) by **April 4, 2022 – 5:00 PM EST.**

V. If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

A. Proposers shall acknowledge receipt of any amendment to this solicitation:

1. By signing and returning ACKNOWLEDGEMENT OF ADDENDA. The District must receive the acknowledgement by the time and at the place specified for receipt of proposals.

V. Non-Collusion Affidavit

Proposer shall submit, with its Proposal, an affidavit stating that neither Proposer nor its agents, nor any other party on its behalf, has paid or agreed to pay, directly or indirectly, any person, firm, or corporation, any money or valuable consideration for assistance in procuring or attempting to procure the contract that will result from this RFP, and further agrees that no such money or consideration will be hereafter paid. This affidavit must be on the form (Appendix A) provided by the District, which is attached to the RFP.

VI. Right of Award

The District reserves the right to select the successful Proposer on the basis of proposals received, without seeking further information or clarification from Proposers. A contract will be awarded to the Proposer who provides the most advantageous offer to the District, with price and other factors considered.

VII. Proposal Acceptance

The submitted proposal shall be open for acceptance for ninety (90) days from the proposal opening date. Any proposal submitted pursuant to this solicitation shall constitute an offer based on the terms included herein and shall constitute the contract under which the District and the Contractor shall perform, unless otherwise modified by mutual agreement of the parties. In no event will changes, amendments, modifications or addendum, written or oral be considered after the Contractor's submission of his/her proposal without the express written consent of the District's Minority/Women Business Coordinator, Paula B. Castleberry.

VIII. Required Review

Proposers should carefully review this solicitation for defects and questionable or objectionable matter. Comments concerning defects and objectionable material

must be made in writing and sent via e-mail to the Minority/Women Business Coordinator at [pcastleberry1@pghschools.org](mailto:pcastleberry1@pghschools.org) by **April 4, 2022 – 5:00 PM EST**. This will allow issuance of any necessary amendments. It will also help prevent the opening of a defective solicitation and exposure of Proposer's proposals upon which award could not be made.

Two types of questions generally arise. One may be answered by directing the question to a specific section of the RFP. These questions may be answered over the telephone. Other questions may be more complex and may require a written amendment to the RFP. The Minority/Women Business Coordinator will make that decision.

- IX. Disclosure of Proposal Contents  
All proposal information, including detailed cost information, will be held in confidence during the evaluation process and prior to the time a notice of intent to award is issued. Thereafter, proposals will not be posted to our website but may become public information upon request.
- X. Confidentiality of Proposals  
Access to government records is governed by the State of Pennsylvania. Except as otherwise required by Pennsylvania law, the District will be exempt from disclosing proprietary information, trade secrets and confidential commercial and financial information submitted in the proposal. Any such proprietary information, trade secrets or confidential commercial and financial information which an Proposer believes should be exempted from disclosure shall be specifically identified and marked as such. Blanket-type identification by designating whole plates or sections as containing proprietary information, trade secrets or confidential commercial and financial information will not assure confidentiality. The specific proprietary information, trade secrets or confidential commercial and financial information must be clearly identified as such.
- XI. Confidential Information, Dissemination of Information, Survival: a. Confidential Information: While preparing for and/or delivering services, Proposer will have access to or receive confidential information that is not generally known to others. Proposer agrees not to use or disclose any confidential information or any records, reports or documents prepared as a result of the contract without prior written consent of the Board or its designee. The proposer agrees to execute any additional confidentiality agreements that may be necessary for performance under this Agreement.
- XII. Subconsultants  
Subconsultants may be used to perform work under this contract. If the Proposer intends to use subconsultants, the Proposer must identify, in their proposal, the names of the subconsultants and the scope of work the subconsultants will perform.

If a proposal with subconsultants is selected, the Proposer must provide the following information concerning each prospective subconsultant within five working days from the date of the District's request.

- A. Complete name of the subconsultant.
- B. Complete address of the subconsultant.
- C. Type of work the subconsultant will be performing.
- D. Percentage of work the subconsultant will be providing.
- E. A written statement, signed by each proposed subconsultant that clearly verifies that the subconsultant is committed to render the services required by the contract.

The Proposer's failure to provide this information, within the time set, may cause the District to consider their proposal non-responsive and to reject the proposal.

The substitution of one subconsultant for another may be made only at the discretion of and with prior written approval from the District's Minority/Women Business Coordinator.

XIII. Single Offer, if Received

If only one offer is received, the District may require that the Proposer provide a cost analysis or a price comparison between the proposed price and that of similar software system and/or services to assure that the proposal price is fair and reasonable.

If requested, the Proposer shall provide the cost analysis or price comparison within five (5) days of the date requested. The District reserves the right to reject or accept the offer on the basis of the cost analysis or price comparison.

XIV. Personnel

In submitting their proposals, Proposers are representing that the personnel described in their proposals shall be available to perform the services described, barring illness, accident or other unforeseeable events of a similar nature. Furthermore, all personnel shall be, at all times, the sole employees of the successful Vendor who as the service provider, under his or her sole discretion, and not employees or agents of the District.

XV. Unacceptable Proposals

The District reserves the right to reject any proposal received from a Proposer that is currently in default on any obligation to the District, either contractually or financially as a principal or surety, or who has failed to perform faithfully any previous contract with the District.

XVI. Taxes

The District is exempt at time of purchase from all sales, excise, and transportation taxes, except State of Pennsylvania gasoline tax. Exemption certificates are available

and will be furnished by the District upon request after contract award. The price bid shall be exclusive of all such taxes and will be so construed.

XVII. Authorized Signature

All proposals must be signed by an individual authorized to bind the proposer to the provisions of the RFP. As a reminder, proposals must remain open and valid for at least ninety (90) days from the opening date.

XVIII. Discussions with Proposers

The District may conduct discussions with Proposers for the purpose of clarification. The purpose of these discussions will be to ensure full understanding of the requirements of the RFP and proposal. Discussions will be limited to specific sections and identified by the Minority/Women Business Coordinator. Discussions will only be held with Proposers who have submitted a proposal deemed reasonably susceptible for award by the District.

Discussions will be after the initial evaluation of proposals by the District. If modifications are made as a result of these discussions, they will be put in writing. Following discussions, the Minority/Women Business Coordinator may set a time for best and final proposal submissions from those Proposers with whom discussions were held. Proposals may be re-evaluated after receipt of best and final proposal submissions.

XIX. Proposal as Part of Contract

Part or all of this RFP and the successful proposal may be incorporated into the contract.

XX. Additional Terms and Conditions

The District reserves the right to add terms and conditions during contract negotiations. These terms and conditions will be within the scope of the RFP and will not affect the proposal evaluations.

XXI. Time for Executing Contract and Damages for Failure to Execute

In the event any Proposer whose proposal has been accepted shall fail or refuse to execute the contract as hereinbefore provided, the District may, at its option determine that such Proposer is in breach of the contract and that the District shall be entitled to liquidated damages as provided below.

The damages to the District for such breach shall be the amount of difference in the total cost between the failed offer and that of the next offer that is most advantageous to the District plus any expenses involved, including legal fees, in connection with delay in execution of a new contract, as well as any other damages permitted by law.

- XXII. **Ambiguity, Conflict or other Errors In RFP**  
If an Proposer discovers any ambiguity, conflict, discrepancy, omission or other error in the RFP, it shall immediately notify the Minority/Women Business Coordinator of such error in writing and request modification or clarification of the document. Modifications will be made by issuing a revision and will be given by written notice to all parties who have received this RFP from the District's Minority/Women Business Department. The Proposer is responsible for clarifying any ambiguity, conflict, discrepancy, omission or other error in the RFP prior to submitting the proposal or it shall be deemed waived.
- XXIII. **Proposals and Presentation Cost**  
The District will not be liable in any way for any costs incurred by Proposers in the preparation of their proposals in response to this RFP nor for the presentation of their proposals and/or participation in any discussions or negotiations.
- XXIV. **Acceptance of Conditions**  
Include any exceptions to the general terms and conditions of the RFP. Preface any exception with a reference to the corresponding section or paragraph and page number.
- XXV. **Debarred Proposers Provision**  
The Proposer, including any of its officers or holders of a controlling interest, is obligated to inform the District whether or not it is or has been on any debarred proposers list maintained by the United States Government. Should the Proposer be included on such a list during the performance of this contract, it shall so inform the District.