



ORLEANS PARISH SCHOOL BOARD
PURCHASING/ANCILLARY SERVICES DEPARTMENT
3520 General DeGaulle Drive, 5th floor, ROOM 5055
New Orleans, Louisiana 70114
Telephone: (504) 304 5645 Fax (504) 309-2879
LESLIE J. REY, EXECUTIVE DIRECTOR

SPECIFICATIONS

FOR

DOCUMENT MANAGEMENT PORTAL

PROPOSAL SUBMISSION DEADLINE: MONDAY, APRIL 11, 2016, AT 4:00 P.M.

Proposal response to be provided as original and one (1) on CD or flash drive in PDF format.

PROPOSER: _____

SIGNATURE: _____

NAME: _____
(PRINT OR TYPE)

ADDRESS: _____

CITY, STATE, ZIP CODE: _____

AREA CODE & PHONE: _____

AREA CODE & FAX: _____

E-MAIL ADDRESS: _____

PAYMENT TERMS _____

ORLEANS PARISH SCHOOL BOARD
PURCHASING/ANCILLARY SERVICES DEPARTMENT
3520 General De Gaulle Drive, Fifth Floor – Suite 5055
New Orleans, Louisiana 70114

ADVERTISEMENT

REQUEST FOR PROPOSAL NO. 16-0029

DOCUMENT MANAGEMENT PORTAL

Sealed proposals will be received by the Orleans Parish School Board in the Purchasing/Ancillary Services Department, 3520 General De Gaulle Drive, Suite 5055, New Orleans, LA 70114 until 4:00 P. M., on Monday, April 11, 2016 for **DOCUMENT MANAGEMENT PORTAL** with the following specifications at which time and place the proposals will be reviewed by an evaluation committee.

Specifications and proposal documents may be obtained upon request from the Orleans Parish School Board Purchasing/Ancillary Services Department, Attn: Leslie J. Rey, in writing, including email leslie_rey@opsb.us, by calling (504) 304-5645, or by visiting the web site www.opsb.us/solicitations.

The Orleans Parish School Board reserves the right to reject any or all proposals whenever such rejection is in its best interest in accordance with law. The provisions and requirements of this advertisement shall not be waived.

ORLEANS PARISH SCHOOL BOARD

BY: Mr. Leslie J. Rey, Executive Director
Purchasing/Ancillary Services & Transportation

FIRST INSERTION: FRIDAY, MARCH 25, 2016
SECOND INSERTION: FRIDAY, APRIL 1, 2016

ORLEANS PARISH SCHOOL BOARD
PURCHASING/ANCILLARY SERVICES DEPARTMENT
3520 General DeGaulle Drive, Fifth Floor, Room 5055
New Orleans, Louisiana 70114

INSTRUCTIONS TO PROPOSERS

Sealed proposals will be received by the Orleans Parish School Board (OPSB) in the Purchasing/Ancillary Services Department, 3520 General De Gaulle Drive, Fifth Floor, Room 5055, New Orleans, Louisiana 70114, until 4:00 P.M., **on Monday, April 11, 2016, for REQUEST FOR PROPOSAL NO. 16-0029 DOCUMENT MANAGEMENT PORTAL** with the following specifications:

A signed original and one (1) copy on CD or flash drive **MUST** be submitted in a sealed envelope and clearly marked: **RESPONSE TO REQUEST FOR PROPOSAL NO. 16-0029 DOCUMENT MANAGEMENT PORTAL TO BE SUBMITTED ON MONDAY, APRIL 11, 2016 UNTIL 4:00 P.M.** and addressed to the Purchasing/Ancillary Services Department, Orleans Parish School Board, 3520 General De Gaulle Drive, Fifth Floor, Room 5055, New Orleans, Louisiana 70114.

Hand-carried and express mail proposals may be delivered to the above address ONLY between the hours of 8:00 a.m. and 4:30 p.m. local time, Monday through Friday, excluding holidays observed by the Orleans Parish School Board.

The Orleans Parish School Board will not be responsible for the opening of, post-opening of, or failure to open a proposal not properly addressed or identified.

The Orleans Parish School Board will not assume the responsibility for any delay as a result of failure of the mail to deliver proposals on time.

No proposals will be accepted after 4:00 P.M. on Monday, April 11, 2016, under any condition whatsoever. In order for your company to be provided proof of delivery time, proposals should be hand delivered, sent by registered mail, or private carrier only to the Purchasing/Ancillary Services Department, 3520 General DeGaulle Drive, Fifth Floor, Room 5055, New Orleans, Louisiana 70114.

REQUEST FOR PROPOSAL DOCUMENTS: A complete set of Proposal Documents shall be used in preparing the proposal; neither OPSB nor its representatives assume any responsibility for errors or misinterpretations resulting from the use of incomplete sets of Proposal Documents.

The forms furnished as part of the specifications **MUST** be used for filing of proposal and must be signed by the Proposer. **No proposals will be considered unless made on the forms provided and must not be detached from the proposal document of which it forms a part.** Failure to follow these instructions may result in your proposal being disqualified.

The statement listed on the bottom of each page (DO NOT DETACH THIS PAGE) indicates that ALL of the pages included in the bid document must be submitted.

Proposals that are submitted with a “NO PROPOSAL” response MUST be clearly stated on the front of the envelope. (If not responding to the proposal, package need not be mailed.)

The Proposer shall wholly absorb all costs incurred in the preparation and the presentation of the proposal. All supporting documentation and manuals submitted with the proposal will become the property of the District unless requested otherwise by the Proposer at the time of submission.

PROPOSER’S REPRESENTATION: Each Proposer by signing and submitting a proposal to the Orleans Parish School Board represents that:

- a. The Proposer has read and understands the Proposal Documents and that his proposal is made in accordance therewith.
- b. The Proposer is furnishing the Certificate of Insurance with the Bid, in accordance with the insurance requirements.
- c. The Proposer has read the Certificate of Independent Price Determination and understands it as acknowledged by his signature on the statement, which is attached to and made part of his proposal.

CONSIDERATION OF PROPOSAL:

All firms or organizations responding to this Request for Proposal are expected to comply with the preparation instructions and submission requirements presented in this section for content and format. Failure to comply with these instructions and requirements may result in the disqualification of the proposal from further consideration.

The proposal shall include the legal name of the proposer and a statement whether the proposer is a sole proprietor, a partnership, a corporation or other legal entity, and shall be signed by the person or persons legally authorized to bind the proposer to a contract.

A contract may be awarded on the proposals as submitted, or the Orleans Parish School Board may elect to negotiate as to technical performance or price, or both, with proposers whose proposals fall in the competitive range.

If a proposal is categorized as "unacceptable", the proposer will not be allowed to submit supplemental information amending its proposal.

The Board reserves the right to select any part of the proposal or the whole proposal as well as to reject any and all proposals and to waive any informalities (except submission deadline) in proposals received whenever such selection, rejection or waiver is in its interest in accordance with law.

All blanks within the Proposal Document shall be filled in by typewriter or manually in ink. The Proposers name, complete address, phone number and principals of the company must be furnished.

Proposers are cautioned to insure that all prices are correct as written/typed. A careless error in the proposal preparation or in quoting prices will not relieve the proposer’s responsibility.

Per Louisiana Revised Statutes Title 38:2221, "NO CONTRACT SHALL BE LET ON A COST-PLUS BASIS".

Each proposal remains valid and binding up to and including one hundred twenty (120) days after the date set for receipt of any proposal. The OPSB may accept any proposal and award a contract within one hundred twenty (120) days of the day for the receipt of any proposal. If the OPSB does not make an award within one hundred twenty (120) days of the date set for the receipt of any proposal, all proposals will be considered rejected.

In the event of the failure of the Proposer to meet the requirements within the time specified elsewhere in these specifications, the Board reserves the right, without prior notice or putting in default but by mere lapse of time, to obtain the service from any other person or firm at such price as may be charged without competitive bids. The difference between the price paid and the contract price shall be deducted from the following or any subsequent payment to the contractor.

All responses, once submitted, will become the property of the Orleans Parish School Board. The OPSB reserves the right to use the proposals at its discretion and also reserves the right to request clarification or documentation of responses to any portion of the narrative. OPSB will disqualify any firm which it finds, in its sole discretion to be submitting false information.

Technicalities or minor irregularities in proposals which may be waived when the Orleans Parish School Board determines that it will be in the Board's best interest to do so (in accordance with law) are mere matters of form not affecting the material substance of the proposal or some immaterial deviation from, or variation in, the precise requirements of the specification and having no effect, or a trivial or negligible effect, on price, quality, quantity or performance of the services being procured, the correction or waiver of which will not affect the relative standing of, or be otherwise prejudicial to, other Proposers. The Orleans Parish School Board may either give a Proposer an opportunity to cure any deficiency resulting from a technicality or minor irregularity in its proposal or waive such deficiency where it is advantageous to the OPSB to do so.

ADDENDA:

In the event that modifications, clarifications, or additions to the RFP become necessary, all addenda will be posted and available for download on the OPSB website at www.opsb.us/solicitations.

CONFIDENTIAL INFORMATION

Do not submit any confidential information. The OPSB is a public organization and any documents submitted herein are considered public information. Any material furnished to OPSB is the property of the OPSB.

DISCLOSURE OF THIRD PARTY INVOLVEMENT

The OPSB recognizes the Proposer's need to respond to this RFP in a manner that is consistent with the Proposer's standard business practices and policies. However, should any proposer submit a proposal that requires third party involvement such as sub-contractors, full disclosure of that involvement should be included in the written proposal. This disclosure should include:

- a. An explanation of the Proposer's relationship to the third party.

- b. A definition of responsibility for proposed deliverables.
- c. A statement of the third party's credentials and qualifications.
- d. An explanation of the proposed relationship between the third party and the District.

CORRECTION OF MISTAKES: Do not erase, correct or write over any prices or figures necessary for the completion of the proposal. Corrections should be made by drawing a line through the unwanted text(s) or number(s) and rewriting the correct text(s) or number(s). **If a correction is necessary, the Proposer must initial each correction. Failure to comply with the requirements may cause your proposal to be disqualified. No proposal shall be altered or amended after the specified time for opening.**

DELIVERY OF SERVICE: In the event of the failure of the Proposer to meet the above requirements or to provide services within the time specified elsewhere in these specifications, the Board reserves the right, without prior notice or putting in default but by mere lapse of time, to obtain the services from any other person or firm at such price as may be charged without competitive bids. The difference between the price paid and the contract price shall be deducted from the following or any subsequent payment to the contractor.

WITHDRAWAL OF PROPOSAL: Any proposal may be withdrawn if clear and convincing sworn, written evidence of obvious mechanical, clerical or mathematical error is furnished by the proposer to the Purchasing/Ancillary Services Executive Director within 48 hours of the submission deadline.

OBJECTION TO THE AWARD: If any Proposer who submitted a Proposal has an objection to the selected Proposer, the objecting Proposer shall furnish that protest, in writing, to the Purchasing/Ancillary Services Executive Director within two (2) Business Days of the date of the notice of selection. The protest shall describe in detail the basis for the protest, and shall request a determination under this section of the Instructions to Proposers.

If a protest is filed in a timely fashion, the Purchasing/Ancillary Services Executive Director will, review the basis for the protest and relevant facts under such terms and conditions, as the Purchasing/Ancillary Services Executive Director considers proper. Upon completion of the review, the Purchasing/Ancillary Services Executive Director shall submit their findings and recommendations to the Superintendent and/or OPSB who shall then review the matter under such terms and conditions, as deemed proper. Upon receipt of authority to act from the Superintendent or OPSB, the Purchasing/Ancillary Services Executive Director will notify those Proposers involved of the decision. The decision shall be final and binding on the objecting Proposer.

SUPPLIER PERFORMANCE AND EVALUATION: The contractor, vendor, service provider and/or supplier performance process will involve evaluating the contractor, vendor, service provider and/or supplier's overall quality status, as well as evaluating the quality of each material or service the Orleans Parish School Board wishes to purchase from the said contractor, vendor service provider and/or supplier. Prior to the invoice submission, the contractor, vendor, service provider and/or supplier, shall meet with a purchasing representative to discuss and review deliverables and timeline events for said services. Contract with automatic renewals will be based upon the Orleans Parish School Board evaluating and analyzing contractor, vendor, service provider and/or supplier performance.

DEBARMENT AND SUSPENSION: To ensure that the Orleans Parish School Board does not enter into a contract with a contract with a debarred or suspended company or individual, each responsive proposer must include a certification statement with each bid on each contract. By signing the certification statement, the proposer certifies that neither it nor any of its principals (e.g., key employees) have been proposed for debarment, debarred or suspended by a Federal Agency. It is the responsibility of each bidder to sign the attached certification statement and submit it with the bid. Failure to comply with this requirement will cause your bid to be disqualified, declared non responsive.

CONTRACTS OVER \$100,000: The Contractor must comply with the applicable standards, orders or requirements issued under Section 306 of the Clean Air Act [(42 USC 1837 (h)], Section 508 of the Clean Water Act (32 USC 1368), Executive Order 11738, and Environmental Protection Agency Regulations (40 CFR, Part 15), which prohibit the use under non-exempt federal contracts, grants or loans of facilities included in the EPA list of violating facilities. Contractor shall report any violations to the Orleans Parish School Board, the Department of Agriculture and to the Environmental Protection Agency Assistant Administrator for enforcement.

CONTRACT AWARD:

The Proposer, to whom the contract is awarded, if any, shall be required to enter into a written Agreement with the District. This Request for Proposal or any part thereof, will be incorporated into and made a part of the final Agreement, however, the District reserves the right to further negotiate the terms and conditions of the Agreement.

CONTRACT PERIOD: The initial term of the contract awarded as a result of this Request for Proposal will be for three (3) years. There will be two (2) renewal options for one year each with the option years to be awarded based on the previous year's performance. The decision to award option years shall be based on the availability of funding for the fiscal year under consideration, school system needs, and Proposer performance.

PROPOSAL INQUIRIES: All inquiries must be addressed in writing to Leslie J. Rey, Executive Director, Purchasing/Ancillary Services & Transportation at 3520 General DeGaulle Drive, New Orleans, Louisiana 70114, including email leslie_rey@opsb.us, by calling (504) 304-5645. Violation of this provision shall be considered grounds for disqualification of the violator employer's proposal.

INDEMNITY AND INSURANCE:

- A. The Contractor shall indemnify and hold harmless the OPSB, its Board Members, Officers, Staff Directors, etc. for and against any and all losses, damages, and liabilities whatsoever for injury to or death of persons, or loss of or damage to property, including Government property of any kind or nature caused by or arising out of the performance of the work or services required hereunder by the contractor or the officers, employees, or agents of the Contractor.
- B. The Contractor shall, as a minimum, obtain and maintain during the entire period of performance of this contract insurance provided by insurers authorized to transact business in the State of Louisiana, has and maintains a minimum of a "A" rating or better financial size category as shown in the most current AM Best Company ratings the

following coverage placements:

1. Workmen's Compensation and Employees Liability Insurance – Worker's Compensation insurance limits as required by the Labor Code of the State of Louisiana meeting minimum statutory requirements and Employer's Liability coverage with a minimum of \$500,000. The policy shall include a **waiver of subrogation** in favor of the District (OPSB).
 2. Comprehensive General Liability/ Professional Liability Insurance – **For Standard Contracts**, minimum limits of \$1,000,000 per occurrence. The policy shall include a **waiver of subrogation** in favor of the OPSB with an **additional insured** endorsement. **For Architectural & Engineering (A&E)** projects, the Contractor shall provide evidence of coverage for Professional Liability and or E&O Liability subject to limits of not less than \$1,000,000 with **additional insured and/or a waiver of subrogation** endorsement in favor of the District (OPSB). The liability insurance shall remain in effect until the end of the Correction Period and at all times after that when the Contractor may be correcting or removing and replacing, defective work.
 3. Motor Vehicle Liability Insurance - Minimum limits of \$250,000 per person and \$500,000 per occurrence for bodily injury liability and \$100,000 for property damage liability is required on each vehicle owned, non-owned or hired to be used in conjunction with the contract. The policy shall include a **waiver of subrogation** in favor of the District (OPSB).
 4. Excess Liability Insurance – The OPSB reserves the right to require this coverage subject to the value of the contract or scope of work required in the contract. If required, the excess liability insurance shall follow the same form and offer the same protections as employer's liability, general liability and auto liability. It shall also be as broad as the underlying policies of liability. Limits of Excess Liability coverage will be established based on the size and scope of the contract project. **Additional insured and/or waiver of subrogation endorsements will be required.**
- C. The minimum insurance amounts specified in paragraph B shall not include a deductible. Notwithstanding, if there is a deductible incorporated into the terms of the insurance policy, then OPSB shall not be liable for the deductible, nor shall it be an allowable cost if paid by the CONTRACTOR. Insurance issued on a claims-made basis and completed operations insurance shall be maintained for 2 years after acceptance and evidence of coverage shall be furnished to the OPSB yearly.
- D. The insurer's cost of providing the insured's a defense and appeal, including attorney fees, shall be supplementary and shall not be included as part of the policy limits, but shall remain the insurer's separate responsibility. If any of the Contractor's sureties or insurers is declared bankrupt or placed into receivership, ceases to meet any of the requirements of the Contract Documents or its license to do business in the State of Louisiana is revoked or expires, the Contractor shall meet the requirements of the contract documents.

- E. Certificates of insurance evidencing that the requirements of paragraph B have been met shall be furnished to OPSB before work is commenced with respect to performance under this Contract. **In addition to the certificate of insurance, a copy of all required endorsements will be required as proof of the coverage placement.** The insurance required pursuant to the provisions of this clause shall be in such form and for such periods of time as OPSB may require or approve, and with insurers approved by OPSB. Provisions shall be made for 30 days advance written notice by mail to OPSB of change in or cancellation of such insurance.
- F. In the event the CONTRACTOR fails to furnish such certificates prior to the commencing of work or to continue to maintain such insurance during the performance of the Contract OPSB shall have the right to withhold any payments or partial payments required to be made under this Contract; and shall have the right to continue withholding any or all of said payments so long as the CONTRACTOR has not complied with the requirements of this clause.
- G. The Contractor shall provide a Certificate of Insurance evidencing Errors and Omissions liability insurance coverage subject to limits of liability of not less than \$1,000,000.00. Furthermore, it shall be mutually agreed that OPSB shall be solely responsible for the contents of any information or documentation, which OPSB may provide to the Contractor to rely upon in the process of this service agreement. Notwithstanding the aforementioned provision, the Contractor shall be responsible for any damages or liabilities to the extent that they result from the Contractor's actual errors, omissions, or negligence pursuant to this Agreement. No changes, modifications, or limitations to these insurance requirements shall be permitted.

Leslie J. Rey, Executive Director
Purchasing/Ancillary Services and Transportation

APPENDIX A
A1: PRINCIPALS OF THE COMPANY

PRESIDENT: _____

VICE-PRESIDENT: _____

SECRETARY: _____

TREASURER: _____

BIDDER: _____

SIGNATURE: _____

NAME: _____
(PRINT OR TYPE)

ADDRESS: _____

CITY, STATE, ZIP: _____

AREA CODE & PHONE: _____

AREA CODE & FAX: _____

PROPOSER'S FEDERAL TAX IDENTIFICATION NUMBER _____

Bidder is (check one) _____ sole proprietorship; _____ partnership; _____ corporation (If corporation, in what state incorporated _____); _____ or joint venture. Identify parties.)

APPENDIX A
A.2: NON-COLLUSION STATEMENT

State of Louisiana
Parish of Orleans

_____,
states that he/she is _____ (a partner of the firm, officer of the corporation, or individual making the foregoing proposal or bid); that said bid is genuine and not collusive or sham; that said bidder has not colluded, conspired, connived or agreed, directly or indirectly, with any bidder or person to put in a sham bid or to refrain from bidding, collusion, or communication or conference, with any person, to fix the bid price or affiant or any other bidder, or to fix any overhead, profit or cost element, or that of any other bidder, or to secure any advantage against any person interested in the proposed contract, and that all statements contained in the said bid or proposal are true.

(Signature)

**APPENDIX A:
A.3: PROPOSER'S OFFER**

TO: ORLEANS PARISH SCHOOL BOARD
Purchasing/Ancillary Services Department
3520 General De Gaulle Drive, Fifth Floor,
Room 5078
New Orleans, Louisiana 70114

1. Having read the Request for Proposal and the Specifications for DOCUMENT MANAGEMENT PORTAL. I the undersigned, authorized to represent corporation, partnership, sole proprietorship (the Company) listed below, hereby submit to the Orleans Parish School Board this proposal for providing the service as listed above.

2. This proposal is submitted on behalf of:

Company: _____

Address: _____
Street Number/P.O. Box Street Name

City State Zip

3. I further certify that I/we have examined and fully comprehend the scope and conditions supplied for the consulting services and that the Company agrees to furnish to the OPSB said services for the payment amount listed on the attached Request for Proposal form.

4. In submitting this proposal, the Proposer agrees to the terms and conditions of the Request for Proposals, including the Specification and instructions to Proposers. If this proposal is signed by a partner, the person hereby states that he/she has the authority to bind the partnership; if signed by a corporate officer or employee, that person hereby states that he or she has the authority to bind the corporation. (Copy of corporate resolution attached).

Signature of Company Representative

Representative's Title

Date

**APPENDIX B:
B.1 ADDENDUM FORM**

This form is to be completed, signed and left attached to the Proposal Documents and delivered to the Orleans Parish School Board by the time and date advertised.

DATE: _____

Orleans Parish School Board
Purchasing/Ancillary
Services Department
3520 General De Gaulle Drive
Fifth Floor, Room 5078
New Orleans, LA 70114

**RE: REQUEST FOR PROPOSAL NO. 16-0029 DOCUMENT MANAGEMENT
PORTAL**

Gentlemen:

In compliance with the Proposal Documents, the undersigned agrees, if this offer is accepted and awarded within one hundred twenty (120) calendar days from the date for the receipt of the offer specified in the Advertisement for Proposals, to furnish any or all services awarded at the unit price offered and during the time period specified. The initial term of the contract awarded as a result of this Request for Proposal will be for three (3) years. There will be two (2) renewal options for one year each with the option years to be awarded based on the previous year's performance. The decision to award option years shall be based on the availability of funding for the fiscal year under consideration, school system needs, and Proposer performance.

Acknowledgment of Addenda:

Addendum No. _____, dated _____

Addendum No. _____, dated _____

Addendum No. _____, dated _____

The proposer acknowledges receipt of the above identified addenda which amended the Proposal Documents.

Signature of Company Representative

Representative's Title

Date

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transactions

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 7 CFR Part 3017, Section 3017.510, Participants' responsibilities. The regulations were published as Part IV of the January 30, 1989, Federal Register (pages 4722-4733). Copies of the regulations may be obtained by contacting the Department of Agriculture agency with which this transaction originated.

(BEFORE COMPLETING CERTIFICATION, READ INSTRUCTIONS THAT FOLLOW)

- (1) The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the prospective lower tier participant is unable to certify any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Organization Name _____

Name and Title of Authorized Representative _____

Signature _____ Date _____

**Instructions for Completing Certification Regarding Debarment, Suspension,
Ineligibility and
Voluntary Exclusion - Lower Tier Covered Transactions (Form AD-1048)**

NOTE: A School Food Authority must require that each responsive bidder include this certification statement with each bid on each contract equaling or exceeding \$100,000, or any contract for audit services regardless of amount.

1. By signing and submitting this form, the prospective lower tier participant providing the certification set out on the above in accordance with these instructions.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms *covered transaction, debarred, suspended, ineligible, lower tier covered transaction, participant, person, primary covered transaction, principal, proposal, and voluntarily excluded*, as used in this clause, have the meanings set out in the Definitions and Coverage sections of the U. S. Department of Agriculture regulations 7CFR 3017 implementing Executive Order 12 549. (Contact the person to whom this proposal is submitted for assistance in obtaining a copy of those regulations.)
5. The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transaction" without modification in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification that a prospective participant in a lower tier covered transaction has not been debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless the participant knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under Paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

CERTIFICATION REGARDING LOBBYING

**CERTIFICATION FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE
AGREEMENTS
EXCEEDING \$100,000 IN FEDERAL FUNDS**

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub awards (exceeding \$100,000 in Federal funds) at all tiers (including subcontracts, sub grants, and contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

NAME/ADDRESS OF
VENDOR _____

TITLE/TITLE OF SUBMITTING
OFFICIAL _____

SIGNATURE _____ DATE _____

Introduction

The mission of the Orleans Parish School Board (OPSB) is to be an exemplary portfolio school district that values excellence, choice, autonomy, accountability, and public engagement. To further this mission, the OPSB Portfolio Office Staff perform multiple functions to assess, maintain, and enhance the portfolio of high-quality school options from which families can choose.

Given the critical impact our work has on the lives of our students, efficiency, transparency, and alignment across all of our projects is of the utmost importance. Currently, multiple systems are used for communication with charter school operators, document collection, process updates, and escalation of issues. These systems include emails and paper documents maintained by staff; however, as our portfolio of schools grows, this work will become more complex and more difficult to manage. In anticipation of future needs, the OPSB Portfolio office seeks to develop systems that can better support our office.

The goal of this project is to create a comprehensive web-based Document Management Portal providing access to all relevant documentation maintained between the Orleans Parish School Board and operators it authorizes to run charter schools. The role of the web portal will be to facilitate existing communication and cooperation between these entities by supporting communications, exchange of documents (applications, annual reviews, audits, etc.), tracking and reporting of engagements.

Objectives

Orleans Parish School Board has issued this RFP for qualified applicants who will support OPSB in delivering an application on Force.com, which will function as a web-based Document Management Portal. Qualified applicants to this RFP will provide consulting, application development, and implementation services related to the Force.com platform, including but not limited to: project management for the duration of the contract, license procurement for the force.com platform, configuration and customization of an application on the force.com platform, as well as support in software implementation and training of internal and external stakeholders.

The objectives of the Document Management Portal are to facilitate existing communication and cooperation to manage the following internal processes:

- Charter School Application Process
- New School Opening Process
- Annual Data Reporting Process
- School Review and Evaluation Process
- Annual Report Publication Process

RFP Outline

Responses to this RFP will detail applicant's ability to address the Proposal Requirements using the following outline:

- A. Executive Summary (limit 2 pages)
- B. Summary of Background & Related Experience (limit 1 page)
- C. Detailed Project Proposal for Document Management Portal System Requirements (limit 10 pages)
 - a. Responses should include a written narrative that demonstrates a clear understanding of the requirements of this RFP and addresses how the proposed technical solution meets each requirement with assumptions clearly stated.
- D. Implementation Work Plan (limit 5 pages)
 - a. Responses should demonstrate a thorough understanding of the nature of the deliverables and the work that the contractor will need to perform in order to meet the objectives and proposal requirements. The work plan should do/include the following:
 - i. describe each deliverable to be produced and the approach, methods, and specific work steps for doing this work and producing the required deliverables
 - ii. work breakdown structure as a baseline scope document that demonstrates the level of effort expected to address each project component
 - iii. work plan and work breakdown structure should align to staffing plan and both should be reflected in cost estimate
 - iv. description of project issue resolution process
 - v. description of change order/change management processes
 - vi. description of user engagement and design methodologies
- E. Implementation Project Schedule
 - a. Response will include a schedule of activities to produce deliverables within requested time frame, as well as a timeline of activities displayed in Gantt chart form.
- F. Staffing Plan detailing estimated resource allocation for the entirety of the project
 - a. Responses will include/address the following:
 - i. proposed team structure throughout each phase of the project including staff role, title, percentage of time dedicated, and hourly cost
 - ii. resumes of proposed project team leads
 - iii. contingencies for adding additional staff for the project
- G. Letters of Reference and Contact Information for current/previous customers (min of one, max of four) preferably reflecting similar professional services or demonstrated expertise in required areas
- H. Cost Estimate – proposed cost of services
 - a. Response will include all major costs broken out to reconcile the proposed overall cost estimate (e.g, labor hours for staff, transportation, cost of Force.com licenses)

Evaluation Criteria

Each proposal will be reviewed by a selection committee to determine if the proposal is in compliance with the RFP as outlined in the specifications. Upon determination of compliance of

ALL proposal specifications, the proposal(s) deemed to be the most responsive and responsible will be evaluated based on the following criteria:

	Criteria	Potential Points
A.	Thoroughness of Project Proposal	0 – 40
B.	Prior experience, reputation, and qualification	0 – 20
C.	Qualifications for the firm’s primary personnel assigned to the project	0 – 10
D.	Familiarity with Orleans Parish educational stakeholders and landscape	0 – 10
E.	Participation by qualified Disadvantaged Business Enterprises	0 – 10
E.	Proposed cost of services	0 – 10
	Total points possible	100

OPSB reserves the right to choose more than one preferred firm and/or to subdivide the assignment, if necessary.

Targeted Project Timeline

RFP Issued	March 2016
Prioritize scope and refine schedule for activities below:	May 2016
System Build	June 2016
System Testing	July 2016
System Roll-out (internal)	August 2016
Issue Resolution	September 2016
Training	October 2016
System Release (external)	Oct-Nov 2016

Proposal Requirements

Qualified applicants to this RFP will be responsible for oversight and implementation of all project tasks and deliverables. The scope of work to be addressed by respondents to this RFP includes the following activities as required to fulfill the project objectives:

- Project Management
- System Analysis & Design
- Development, Configuration, & Documentation
- System & User Acceptance Testing
- Training
- Implementation
- User Support & Maintenance

Project Management

Throughout the project, the Contractor will be responsible for monitoring day-to-day operations, managing project staff, and regular communication with OPSB project staff. The project management methodology used by the Contractor should include industry best practices and the

functions of the Project Management Knowledge Areas and Process Groups contained in the Project Management Institute's Project Management Body of Knowledge (PMBOK).

Responsibilities

Contractor will be responsible for providing the following services:

- *Kick-off meeting*

The Contractor will schedule a kick-off meeting with OPSB staff within three days of starting work

- *Day-to-day management of project staff*

Contractor has primary responsibility for recruiting, managing and replacing staff members in order to complete project deliverables

- *Ongoing communication with OPSB Portfolio office*

Contractor will maintain regular communication regarding status of project and key issues affecting timeline and budget

- *Maintenance of project management deliverables*

Contractor will develop and maintain deliverables (Project Communication Plan, Change Management Plan, and Status Reports) and will make necessary updates as needed to reflect project status. Contractor will share all deliverables with OPSB on scheduled timeline

- *Conduct regular reporting and status meetings*

Contractor will conduct regular meetings (either on-site or remote) to provide periodic reporting of project status to OPSB staff and stakeholders. Meetings will include, at a minimum, weekly meetings with OPSB project staff to review a pre-set agenda. The focus of weekly meetings will be to address project accomplishments and issues, review updates to project deliverables, and discuss Weekly Status Reports.

Deliverables

- *Project Schedule*

Contractor will update Implementation Project Schedule submitted with Proposal for OPSB approval, within 7 days of start of work. Project schedule will be updated, as needed, throughout term of project.

- *Project Communications Plan*

Contractor will develop a Project Communication Plan to be delivered to OPSB at the Kick-off Meeting. Project Communication Plan will lay out methodology for communications between Contractor and OPSB relating to project. This plan should include communication protocols and procedures for reporting to OPSB stakeholders regarding project issues, risks, and change orders.

- *Change Order Log*

Contractor will maintain a log of any Change Orders submitted by OPSB throughout the duration of the project. Change Orders will follow the Contractor's Change Management process, as submitted with the proposal.

- *Issue Log*

Contractor will maintain a log of any Issues identified throughout the course of the project (both open and addressed). Issue Log will identify issues, impact to project, resolution steps (as identified), and final decisions.

- *Weekly Status Reports*

Contractor will develop Weekly Status Reports to be delivered to OPSB electronically at the start of each Weekly Meeting. Weekly Status Reports will contain, at a minimum, an overview of the project activities for the week, an indication of whether or not the project as a whole is on-time

and on-budget, an indication of whether anticipated deliverables are on-time, a review of any project issues, a summary of key decisions or input required from OPSB.

System Analysis & Design

Selected contractor is responsible for detailed review and analysis of all requirements provided in the RFP and development of detailed specifications required to develop the Document Management Portal. The System Analysis and Design methodology used by the Contractor should reflect industry best practices for software design and development.

Responsibilities

Contractor will be responsible for providing the following services:

- *Review, validate, and refine requirements*

In advance of system development, Contractor will review and validate requirements specified in this RFP. These requirements will serve as a baseline for the system requirements, but will require Contractor to work with OPSB stakeholders to fully understand scope, purpose, and implications of each requirement.

- *Conduct design sessions*

Contractor will engage OPSB stakeholders to elicit information and design a user-friendly and intuitive system that addresses the underlying needs expressed.

- *Document system requirements*

Contractor will maintain documentation of system functional and non-functional requirements. Requirements will be documented in system Requirements Specification Document to be delivered and approved by OPSB prior to system configuration and development.

Deliverables

- *Requirements Specification Document*

Contractor will develop and maintain a System Requirements Specification document, which will include system functional and non-functional requirements.

- *Interface Design*

Contractor will provide visual designs for Document Management Portal interface, which reflect system requirements and project objectives. Interface design will be reviewed and approved by OPSB prior to system configuration and development.

Development, Configuration & Documentation

Contractor will be responsible for developing the Document Management Portal in the Force.com environment. It is the contractor's responsibility to procure, install, and maintain all of the software and technical accessories required to accomplish the development tasks.

Responsibilities

Contractor will be responsible for providing the following services:

- *Development, Configuration and Unit Testing*

Contractor will develop and configure system components in order to implement technical solution as proposed in Requirements Specification Document. Contractor is responsible for unit testing of each developed/configured component to ensure system design is functional and meets the project objectives as specified in the proposal. Completion of development, configuration, and unit testing will be system functionality that is ready for User Acceptance Testing.

Deliverables

- *Operational Documentation*

Contractor will develop and maintain documentation of system functionality and provide updates throughout the development process as features are completed. Operational documentation must contain an index of all relevant information, images of system interface screens (UI screenshots) with accompanying descriptions describing functionality as it relates back to requirements of this RFP, descriptions of all error messages and the steps to correct such errors, data dictionary containing format and description of all stored data fields, descriptions of all reports generated within the system.

System and User Acceptance Testing

Contractor's work will be subjected to system and user acceptance testing.

Responsibilities

Contractor will be responsible for providing the following services:

- *Develop and execute internal system testing*

Contractor will develop internal system testing protocols such that it can be determined that completed work meets all requirements as specified in this RFP and built upon in Requirements Specification Document and Operational Documentation. The scope of internal testing may include regression testing, load testing and balancing that reflect actual system usage at estimated user capacity.

- *Manage and support customer system testing and acceptance*

Contractor will certify work is complete and meets requirements, based on successful completion of internal system testing. Upon certification, Contractor will ensure OPSB project staff are able to validate system test and that stakeholders may perform User Acceptance Testing (UAT).

- *Document and track all defects as encountered through system testing and UAT*

Contractor will maintain System Testing Results Log and detail plan for resolution of all identified defects.

- *Perform required system modifications*

Contractor will perform needed system modifications to address identified defects and/or ensure system meets approved requirements as specified in System Requirements Document.

Deliverables

- *User system testing and UAT environments*

Contractor will provide "sandbox" environments for OPSB staff and stakeholders to test functionality prior to its production release. Contractor will provide OPSB with direct access to these environments such that independent reviews can be conducted.

- *System Testing Plan*

Contractor will document internal system testing protocols in System Testing Plan, which will detail planned tests required to ensure system is operational and will function at full capacity.

- *System Testing Results Log and Defect Resolution Plan*

Contractor will document and maintain log of results identified through system testing as well as a schedule and methodology for resolving defects.

Implementation

Contractor is responsible for supporting OPSB in implementation of project functionality. This includes managing release of functionality to live force.com environment, procuring and administering force.com licenses, securing any required domains, configuring live environment, and developing user documentation.

Responsibilities

- *Procure and configure access to application on Force.com platform*

Contractor will procure and configure Force.com licenses such that all specified users and potential users may access the system in the production environment upon completion of project

- *Ensure system data processing fidelity*

As it relates to Contractor's configurations and developments, Contractor is responsible for establishing policies and procedures to maintain and secure OPSB data created and stored in Force.com. Contractor will provide recoverability of all data files to be uploaded to system and will ensure data integrity of all data files during an electronic transfer. Contractor will ensure security of all data using encryption whenever appropriate. Contractor will ensure timely processing, by implementing automated quality assurance standards, to validate the transfer data and discover inconsistencies and other anomalies of the data files.

- *Ensure secure management of system data*

The Contractor must use due diligence to ensure computer and telecommunications systems and services involved in storing, using, or transmitting OPSB data are secure and to protect that data from unauthorized disclosure, modification, or destruction. OPSB data includes all data and information created by, created for, or related to the activities of the OPSB and any information from, to, or related to all persons that conduct business or personal activities with the OPSB.

- *Ensure data security and confidentiality of data*

Contractor must provide system and data security including confidentiality of data. Contractor will assume total liability if a breach occurs by a person or persons employed by the Contractor or subcontractor(s) in any areas of responsibilities referenced in this section.

The Contractor agrees not to disclose any Confidential Information, will restrict circulation of Confidential Information within its organization to allow individuals that have a need to know the Confidential Information, will not incorporate any portion of any Confidential Information into any work or product, other than a Deliverable, and will have no proprietary interest in any of the Confidential Information, will have all of its employees, who have access to any Confidential Information, sign all confidentiality agreements required by OPSB, will return all originals of any Confidential Information and destroy any copies it has made on termination or expiration of this Contract; and may disclose Confidential Information to its subcontractors on a need-to-know basis, but they will be obligated to the requirements of this section.

- *Ensure internal system security to protect against security threats*

The Contractor must provide internal system and data security procedures designed to ensure confidentiality of data and to protect against computer viruses and other security threats, such as, hackers.

Deliverables

- *Implementation Plan*

The Contractor will provide an Implementation Plan that details a timeline for release to production, highlights all necessary activities, and certifies required security measures.

- *Force.com licenses*

Contractor will, on behalf of the OPSB, negotiate and/or purchase and configure Force.com licenses. Upon completion of the project, Contractor will provide all credentials and contact information for OPSB to maintain Force.com platform and licenses.

User Support and Maintenance

Contractor is responsible for the maintenance of system in accordance with Service Level Requirements as defined in this RFP.

Responsibilities

- *Classify defects and performance issues and resolve as relating to service levels below*

Contractor must fix all system defects and system performance issues, and in releasing to production environment, perform regression testing to ensure fixes do not negatively impact existing development. Timelines for addressing system defects and performance issues will be determined based on severity and priority levels below:

Severity

- Severity 1 - Catastrophic defect that causes total failure of the software or unrecoverable data loss. There is no work around. Example: defects that cause the system to crash, corrupt data files, or completely disrupt service.
- Severity 2 - Defect results in severely impaired functionality. A work around may exist but its use is unsatisfactory. Examples: with certain steps, the system may generate a Windows error/message that can be bypassed by clicking Ok and continuing with no harmful effects.
- Severity 3 - Defect causes failure of non-critical aspects of the system. There is a reasonably satisfactory work around. Example: a Report is not recognizing an option correctly, but if a filter is set, the report can be generated with the proper output.
- Severity 4 - Defect of minor significance. A work around exists or, if not, the impairment is slight. Example: A button or button set is slightly off center on a data screen, or the problem is purely cosmetic and not easily recognizable.

Priority

- **Urgent** – Issue/problem has caused, or has potential to cause, the entire system to go down or to become unavailable; Contractor must review and diagnose all urgent issues within four hours of report of issue.
- **High** – Issue/problem directly affects the public, or a large number of stakeholders are prevented from using the system. High-priority problems include those that render a site unable to function, make key functions of the system inoperable, significantly slow processing of data, severely impact multiple stakeholders, lead to federal penalties, misdirect payments, or severely corrupt data; Contractor must review and diagnose all high priority issues within four hours of report of issue.
- **Medium** – All other issues/problems. Medium-priority problems include those errors that render minor and non-critical functions of the system inoperable or unstable, and other problems that prevent stakeholders or administrators from performing some of their tasks; Contractor must review and diagnose all medium priority issues within six hours of report of issue.
- **Low** – All service requests and other problems that prevent a stakeholder from performing some tasks, but in situations where a workaround is available; Contractor must review and diagnose all low priority issues within six hours of report of issue.

Deliverables

- *User Support and Maintenance Plan and Service Level Agreement*

Contractor will provide user support and maintenance plan detailing process for maintenance communications. User Support and Maintenance Plan will detail scheduled maintenance timeline as it relates to OPSB users.

- *Performance Issues Log and Release Reports*

Contractor will maintain and publish a list of identified defects and resolution timeline and will provide to OPSB.

SCOPE

The Following section details the functional requirements the system will have to accomplish. OPSB follows the Standards of Quality Charter Authorizing set by National Association of Charter School Authorizers (NACSA). These include the following standards, which inform the processes which OPSB implements for charter school oversight:

Application Process and Decision-making

A quality authorizer implements a comprehensive application process that includes clear application questions and guidance; follows fair, transparent procedures and rigorous criteria; and grants charters only to applicants who demonstrate strong capacity to establish and operate a quality charter school.

Ongoing Oversight and Evaluation

A quality authorizer conducts contract oversight that competently evaluates performance and monitors compliance; ensures schools’ legally entitled autonomy; protects student rights; informs intervention, revocation, and renewal decisions; and provides annual public reports on school performance.

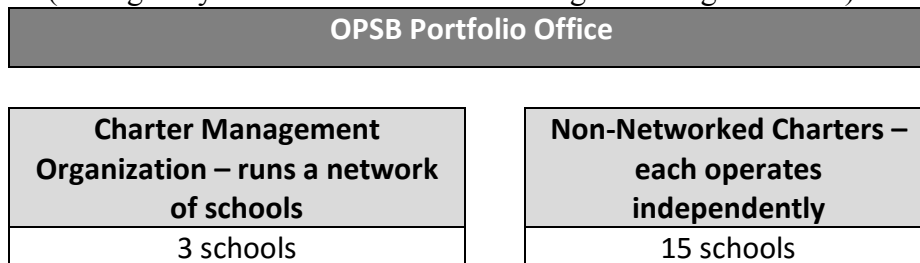
Revocation and Renewal Decision Making

A quality authorizer designs and implements a transparent and rigorous process that uses comprehensive academic, financial, and operational performance data to make merit-based renewal decisions, and revokes charters when necessary to protect student and public interests.

To address these principles, OPSB Portfolio Office has instituted the following processes:

Portfolio Relationship Management

The function of the Portfolio Office is to maintain relationships between OPSB central office and the charter organizations that fall within the OPSB portfolio. These organizations include 18 charter schools (managed by a total of 16 different management organizations).



OPSB Responsibilities

In order to maintain relationships throughout the lifetime of the contract, OPSB needs to maintain contact information of individuals within each organization, with each organization generally having multiple points of contact. Additionally, in order to best support each school, OPSB staff must quickly access reports of each school’s renewal status, performance, and other key metrics.

To make this work, OPSB staff maintain directories of charter management organizations, school staff and board members for each school in the OPSB portfolio. OPSB staff regularly share information to illuminate the picture of what concerns each school so that the appropriate services can be deployed.

System Requirements

1. System must enable OPSB to manage complex (tiered) relationships between entities (Tier 1: OPSB; Tier 2: Charter Management Organization (CMO); Tier 3: School/Program)
 - a. system must support tiered relationships
 - b. system must allow OPSB to add/remove/modify entities
 - c. add/remove CMOs and Schools
 - d. modify CMO/School relationships (e.g., move a school from one CMO to another)
 - e. maintain snapshots of CMO/School relationship annually
 - f. allow OPSB to control permissions for individuals based on their organization/ tier
 - g. allow individuals to have multiple permissions based on multiple relationships
2. System must enable OPSB staff to easily navigate data for CMOs and schools
 - a. display dashboards and profiles for each school
 - b. display dashboards and profiles for each CMO that controls a cluster of schools
 - c. display rosters of contacts (staff and board members) for each school – rosters must be accessible historically such that former board members are easily tracked
 - d. display snapshots of relevant academic, operational, and financial data for each school
 - e. enter comments (internally visible/externally visible) relating to each school, which will appear on the school’s profile page
3. System must enable CMO/School staff and Board Members to view/edit their own profile page
 - a. view dashboards and profiles for each school
 - b. view dashboards and profiles for each CMO that controls a cluster of schools
 - c. view/edit rosters of contacts (staff and board members) for each school – rosters must be accessible historically such that former board members are easily tracked

Charter Application Process

In order to address unmet needs in the current portfolio of schools, and to increase choice for families within Orleans Parish, OPSB operates a New School Charter Application Process annually. Through this process, OPSB solicits applicants (both new and existing charter operators) to apply for charters to operate a school within the OPSB portfolio. The 2015-16 Charter Application Process is as follows, OPSB releases a two-part request for applications. Part 1 requires applicants to give notice of their intent to apply and demonstrate their organization’s eligibility to participate in the process. OPSB reviews all Part 1 applications to determine eligibility for applicants to proceed to part 2. Part 2 requires lengthy written responses and additional documents highlighting financial and organizational performance. OPSB initially reviews part 2 applications for completeness and then releases the applications to a team of independent evaluators for a comprehensive review. The independent evaluators then complete a final recommendation to approve or deny a charter for each application. These recommendations are ultimately shared with the Orleans Parish School Board, which make a final determination of which applicants they will grant charters. The Charter Application Process is completed when approved charters are granted and operating agreements are signed between OPSB and approved charter operators to carry-out the duties laid out in the application.

OPSB Responsibilities

OPSB staff draft charter school applications and set annual timeline activities, which are then communicated to potential applicants. Throughout the charter school application process, OPSB

staff are responsible for tracking applicant behaviors, in particular progression from one stage to the next, as well as addressing questions to support completion of applications. During the eligibility review, and application completeness check, OPSB staff reviews each submitted application to determine whether the applicant will move on to the next phase. OPSB staff is also responsible for supporting the independent evaluation teams by making sure all relevant information is shared. Finally, OPSB coordinates the delivery of Independent Evaluation reports and other information to the Board to facilitate charter decisions.

System Requirements

4. System must enable applicants to register to participate in the annual Charter Application Process
 - a. enter organization and contact information to create a user profile
 - b. multiple members of organization create individual user profiles allowing them to collaborate on application
5. System must enable users who are already registered to use the system for other processes (previous applicants, current charter school operators) to register to submit a new Charter Application Process using their existing login information and profile
6. System must enable charter school applicants to withdraw applications and delete all information entered up until the submission stage
7. System must enable System Admin to manage functions on behalf of other users
 - a. register or re-set accounts
 - b. enter new members within existing organizations
 - c. create and delete existing organizations
 - d. upload documents on behalf of any other user
8. System must enable OPSB Staff to customize and display a timeline of events and deadlines relevant to Charter Application Process
 - a. customize and display a timeline of events and deadlines relevant to Charter Application Process, which indicates upcoming and past events
 - b. publish materials and guides for applicants and participants in multiple formats (.doc, .pdf, .xls, .ppt)
9. System must enable OPSB staff to manage promotion, participation, and follow-up around key public events
 - a. publish information about information sessions and office hours for applicants
 - b. publish event time and location
 - c. track participation and contact information for attendees
 - d. share communications with all attendees via email
10. System must enable OPSB staff to customize an application workflow that makes clear the required components of the application that applicants are required to submit and guides them through each step of all application phases. Application workflow for Part 1 will be separate from Part 2.
 - a. customize multiple application process workflows uniquely for each year (example new operator applications vs existing operator applications)
 - b. set deadlines (after which application components can no longer be submitted)

11. System must enable Charter School Applicant to view application deadlines and workflow steps
 - a. view which steps have been completed/not yet completed
12. System must enable Charter School Applicant to complete and submit application for Part 1 and Part 2
 - a. submit all components of Charter School Application
 - b. build application over time by adding elements, saving my work and returning
 - c. create application online by typing, or pasting copied text into application
 - d. create application online by uploading individual documents or portions of application
 - e. upload entire application at one time
 - f. after reviewing application, submit it to OPSB for review
13. System must enable Charter School Applicant to view a confirmation that all materials have been submitted, including a copy of all materials they have submitted
 - a. see all resources that have been uploaded or entered into application
 - b. view a confirmation (which can be printed or saved via pdf) including the date/time that application was received
14. System must enable OPSB staff to see an overview of active applications including status (e.g., when submitted, who submitted, status, etc.)
15. System must enable OPSB staff to review Part 1 materials and determine eligibility for Part 2
 - a. if Applicant is not eligible, invite them to re-submit Notice of Intent and Eligibility one-time with highlighted areas revised
 - b. if Applicant is eligible, invite them to submit a full application
 - c. change application status from “under review” to “eligible”/”not eligible” and share feedback
 - d. inform applicant of their application status
16. System must enable OPSB staff to review Part 2 materials and determine completeness of application
 - a. if application is not complete, invite applicant to revise and resubmit application
 - b. change application status from “under review” to “eligible”/”not eligible”
 - c. inform applicant of their application status
17. System must enable OPSB staff and Independent Evaluator Leads to manage Evaluator assignments
 - a. assign applications to multiple evaluators for review
 - b. hide applications from evaluators not permitted to view
18. System must enable OPSB staff and Independent Evaluators to review and manage materials from submitted applications
 - a. open entire application to view as a document online
 - b. open individual application components to view as a document online
 - c. download entire application and individual components
19. System must enable OPSB staff and Independent Evaluators to manage Capacity Interviews
 - a. document date and time of each Capacity Interview

- b. document participants in each Capacity Interview
 - c. upload Capacity Interview Questions and video of Capacity Interview
 - d. document/upload notes from Capacity Interviews
 - e. hide notes of Capacity Interviews from applicant
20. System must enable Independent Evaluators to manage evaluations
- a. collect clarification questions to be shared with the Applicant
 - b. collect responses to applications to be shared with fellow Evaluators
 - c. collect final evaluation summary report to be shared with OPSB
 - d. hide final evaluation summary report from Applicant until published
 - e. publish final evaluation summary report to Applicant
 - f. collect responses to final evaluation summary report from Applicants
 - g. collect final recommendations to OPSB board members
 - h. collect OPSB board decisions
 - i. collect Charter Operating Agreement
21. System must enable application process data to be archived from each year
- a. all applications (including those which do not make it through final steps of the process) should be archived for future reference
 - b. archived applications are visible by OPSB in future years
22. System must enable roll-over of applications to workflows for existing CMOs (School Opening Workflow, Annual Review Workflow, etc)
- a. Approved applications can be added to school lists as new schools (either under existing LEA or new LEA)

New School Opening Process

Upon finalization of the charter operating agreement, the charter applicant becomes a new OPSB school and the applicant team undergoes a planning year prior to opening the school. The materials and activities required of charter operators are detailed in a charter school opening checklist.

OPSB responsibilities

During this time, OPSB collects key data from the charter operator in order for the school to open in good standing. OPSB tracks the completion of events. In the event that the charter operator is not able to produce required materials in a timely fashion, OPSB may intervene or escalate delays that indicate the charter operator will not be able to perform the duties of the operating agreement in the scheduled timeframe.

System Requirements

23. System must enable OPSB staff to customize schedule and timeline for new school opening
- a. enter/display a list of items new schools must report
 - b. enter/display reporting timelines
 - c. display a calendar view of new school opening events
 - d. enter/display status of completion for each required item
 - e. enter/display status of new school opening

- f. upload New School Opening Guide and Reporting Guide, as well as templates of required reporting items
24. System must enable charter operators to review Reporting Calendar to see required deadlines
- a. view current and past deadlines for reporting
 - b. view supporting documents online
 - c. download supporting documents in multiple formats (.doc, .pdf, .xls, .ppt)
25. System must enable charter operators to submit reporting components per Reporting Calendar
- a. add additional reporting components over time
 - b. complete reporting information online by typing, or pasting copied text into my application
 - c. upload reporting components in multiple formats (.doc, .pdf, .xls, .ppt)
 - d. view/edit reporting components previously submitted
 - e. view confirmation that materials have been submitted
 - f. enter comments to OPSB about materials that have been submitted
26. System must enable OPSB staff to view active reporting submissions including status (e.g., when submitted, who submitted, status, etc.)
- a. review submitted reporting components
 - b. open all reporting components for an entire school during the current school year
 - c. open individual reporting components to view as a document online
 - d. download all reporting component and individual component documents in multiple formats (.doc, .pdf, .xls, .ppt)

Annual School Reporting Process

Schools are required to update the information relevant to their operating agreement on an annual (or more frequent) basis. Additionally, schools are asked to report key data to OPSB, which reflects their organizational, academic, and financial health. The collection of such data may require schools to access templates provided by OPSB and complete these templates with the requisite information.

OPSB responsibilities

During this time, OPSB collects key data from the charter operator and makes updates where necessary. OPSB tracks the timeliness and completeness of submissions.

System Requirements

27. System must enable OPSB staff to customize schedule and timeline for annual reporting
- a. enter/display a list of items schools must report
 - b. enter/display reporting timelines
 - c. display a calendar view of school reporting events
 - d. enter/display status of completion for each required item
 - e. enter/display status of each school's reports
 - f. easily add/remove fields/forms in workflow
 - g. upload Annual Reporting Guide, as well as templates of required reporting items
28. System must enable charter operators to review Reporting Calendar to see required deadlines
- d. view current and past deadlines for reporting

- e. view supporting documents online
 - f. download supporting documents in multiple formats (.doc, .pdf, .xls, .ppt)
29. System must enable charter operators to submit reporting components per Reporting Calendar
- a. add additional reporting components over time
 - b. complete reporting information online by typing, or pasting copied text
 - c. upload reporting components in multiple formats (.doc, .pdf, .xls, .ppt)
 - d. view/edit reporting components previously submitted
 - e. view confirmation that materials have been submitted
 - f. enter comments to OPSB about materials that have been submitted
30. System must enable OPSB staff to view active reporting submissions including status (e.g., when submitted, who submitted, status, etc.)
- a. review submitted reporting components
 - b. open all reporting components for an entire school during the current school year
 - c. open individual reporting components to view as a document online
 - d. download all reporting component and individual component documents in multiple formats (.doc, .pdf, .xls, .ppt)
 - e. enter comments regarding materials that have been submitted (both visible and hidden from charter operators)
 - f. set schedule to send automatic reminders to schools regarding the status of their submissions (specifically missing submissions as deadlines near).

Annual Review Process

As a pre-requisite to further action (intervention, renewal), OPSB performs annual reviews for each school in the OPSB Charter Portfolio to determine compliance with the [OPSB Performance Framework](#).

Performance Framework

The Performance Framework sets the academic, organizational, and fiscal standards by which OPSB students will be evaluated, informing both the Orleans Parish School Board and individual school officials about school performance and sustainability

The Performance Framework has three main components:

- Academic Performance
- Financial Performance
- Organizational Performance

Academic Performance

The Academic Performance Framework includes measures that allow OPSB to evaluate charter school academic performance. This section answers the evaluative question: Is the academic program a success? A charter school that meets the standards in this area is implementing its academic program effectively, and student learning – the central purpose of every school – is taking place.

OPSB measures each school's academic performance based on collection of data from the Louisiana Department of Education (including school performance scores, state letter grades, and state test scores). These data are collected from the state. OPSB then analyzes and

compares these data with enrollment trends and local performance metrics to determine whether the school's performance meets each standard.

Financial Performance

The Financial Performance Framework is an accountability tool that provides OPSB with data necessary to assess the financial health and viability of charter schools in its portfolio on an ongoing basis and for the purposes of an annual review. The framework summarizes a charter school's current financial health while taking into account the school's financial trends over a period of three years. The measures are designed to be complementary. No single measure gives a full picture of the financial situation of a school. Taken together, however, the measures provide a comprehensive assessment of the school's financial health and viability based on a school's historical trends, near-term financial situation, and future viability.

OPSB measures financial performance based on quarterly and annual financial audits provided during the Annual Reporting Process. These data are reported by each school and analyzed by the OPSB Finance Department and Portfolio Office to determine whether the school's performance meets each standard.

Organizational Performance

The purpose of the Organizational Performance Framework is to communicate to the charter school and public the compliance-related standards that all charter schools authorized by OPSB must meet. The Organizational Framework lists the standards that the charter school is already required to meet through state and federal law, rules, regulations, or the charter contract.

OPSB measures organizational performance based on school's compliance with Annual Reporting guidelines (including the timeliness and accuracy of reports, and meeting targets for attendance and other metrics); however, the primary mechanism used to evaluate organizational performance is a site visit in which members of OPSB staff visit schools and speak further with school staff and board members.

The purpose of conversations with school leaders and board members is two-fold. During these conversation, OPSB not only seeks to evaluate the school based on the performance framework, but also to learn about pressing issues, concerns, and goings on at the school in which OPSB can support the school leader, leadership team and/or the board to improve the school's success.

These topics may include school enrollment trends, school facilities issues or anticipated plans, leadership succession planning, and management questions.

Each site visit contains a combination of the following components:

Site Visit Component	Time Needed
Orientation by School Leader	30 minutes
Observations/Walkthroughs	60 minutes
Board Focus Group	30 minutes
Administration Meeting	30 minutes
Sped/ELL Teams and Review	30 minutes
Relevant Focus Group(s) (if requested)	30 minutes each
Document Review	Ongoing
End of Day Debrief with Administrators	30 minutes

As part of the site visit, schools are asked to provide the following materials to OPSB Portfolio Office for review:

- **A master class schedule for the day of the visit.** Please identify on the schedule which classes are ELL, special education inclusion, pullout, or substantially separate placements.
- A completed copy of the **Education Program Description Template**
- The school's preferred times for site visit components.
- Completed **Special Education and ELL Information Request Document**
- The school's current **Discipline Policy/Student Manual**
- An **updated list of your school's board members and officers**
- **Building Maintenance Plan** per OPSB Policy E500
- **Staff credentials** per NCLB, state law
- **Procedures for protecting student records** per LA Acts 937, 677, 340
- **Employee background check and fingerprint records**
- Any other documentation that helps to tell the story of your school to an external team of visitors. Existing documents, including strategic plans and school improvement plans, are examples of documentation that could be provided

OPSB responsibilities

OPSB collects key data reported from schools (e.g., financials), from internal OPSB systems (e.g., state testing and attendance data), and from Louisiana Department of Education (e.g., school performance scores and letter grades).

In advance of each site visit, OPSB staff prep the questions and information they feel relevant for the school leader and board members. Additionally, OPSB prepares a Preliminary Evaluation Report highlighting the enrollment and demographics of the school and the school's academic and financial performance data. School enrollment figures and contact information is also shared with OPSB staff attending the site visit.

System Requirements

31. System must enable OPSB staff to access and load relevant data for reporting
 - a. load a variety of file types to system database for use on various screens and reports
 - b. integrate data feeds from OPSB database
 - c. access data entered in system for other purposes (e.g., financial data submitted as part of annual reporting)
32. System must enable OPSB staff to create and share Preliminary Evaluation Report
 - a. customize template for report (including addition/removal of report components)
 - b. calculate values (e.g., percentages) based on raw data loaded to database
 - c. set thresholds for meeting standards (e.g., adjust minimum days unrestricted cash)
 - d. calculate whether school's performance (based on data in database) meets thresholds for standards (e.g., if school has current ratio >1, the system would calculate that the school did not meet the standard)
 - e. enter determinations of whether or not the school has met the standard
 - f. enter comments on each component to display on the report
 - g. print Preliminary Evaluation Report
 - h. save Preliminary Evaluation Report as .pdf, .xls, .doc
 - i. share Preliminary Evaluation Report internally with OPSB staff
 - j. enable OPSB staff to edit Preliminary Evaluation Report

- k. share Preliminary Evaluation Report digitally (in system) with charter school staff and board members
33. System must enable school staff to submit relevant site visit materials
 - a. add additional reporting components over time
 - b. complete reporting information online by typing, or pasting copied text
 - c. upload reporting components in multiple formats (.doc, .pdf, .xls, .ppt)
 - d. view/edit components previously submitted
 - e. view confirmation that materials have been submitted
 - f. enter comments to OPSB about materials that have been submitted
 34. System must enable OPSB staff to finalize Evaluation Report and save annual evaluations
 - a. edit Evaluation Report, adding organizational performance information, and save final copy
 - b. save Evaluation Report as .pdf, .xls, .doc
 - c. share Evaluation Report internally with OPSB staff
 - d. enable OPSB staff to edit Evaluation Report
 - e. share Evaluation Report digitally (in system) with charter school staff and board members
 35. System must host Annual Report containing highlights from Annual Reviews and final evaluations for each school

System Roll-over

CMO and School rosters will fluctuate annually as determinations are made to renew or sunset charter agreements, and new school contracts are signed.

OPSB responsibilities

OPSB needs to continuously update relevant data on an annual basis such that data is current and prior data is archived.

System Requirements

1. System must enable OPSB staff to close out current school year
2. System must archive data by school year



ORLEANS PARISH SCHOOL BOARD

Purchasing/Ancillary Services

VENDOR REGISTRATION FORM

DATE (MM/DD/YYYY): _____

COMPANY NAME: _____

CONTACT: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

REMIT TO ADDRESS: _____

CITY, STATE, ZIP: _____

PHONE: _____ FAX: _____

E-MAIL ADDRESS: _____

TAX ID NO: _____

DUNS NO. _____

MANUFACTURER DISTRIBUTOR SALES OFFICE SERVICES STATE CONTRACT

NO. _____

PLEASE IDENTIFY COMMODITIES AND/OR SERVICES THAT YOUR COMPANY PROVIDES:

Company Representative

Title

FOR ORLEANS PARISH SCHOOL BOARD USE ONLY

SUBMITTED
BY:

SCHOOL/
DEPARTMENT:

In addition to the Vendor Registration form the OPSB requires that each respondent submit a recent W-9 form.

The most recent W-9 form, as provided by the Internal Revenue Service, can be accessed at <http://www.irs.gov/pub/irs-pdf/fw9.pdf>.