



## Request for Information No. II

### RFP No. 15/16-0003IT, Business Intelligence and Analytics Solution

February 1, 2016

#### Response to Vendors' Questions

- 2.1 Question: Can you provide greater detail related to both your existing MS SQL Server environment (amount of data, where data resides currently, etc.)?

Answer: IUSD currently has a paired MS SQL Server AlwaysOn environment with approximately 100GB of active data and 1TB of archival data. This data is currently in the formats used by IUSD's student information system, human resources information system, and other systems. Vendors should presume that an extract-transform-load process will be required and that some type 2 slowly changing dimensions will be required.

- 2.2 Question: As well as desired outcomes for this project (which specific report views, dashboards are required? Which specific questions are you trying to address?, Will vendor have to re-create existing reports in new, unified BI solution? Will vendor have to create net new reports for IUSD? If so, how many, and of which type?, etc.). Does IUSD have an end-game vision related to the desired project outcome, or is IUSD seeking that final vision from prospective vendors?

Answer: The desired outcome for this project is twofold.

The first desired outcome is the selection of an easy to use, flexible, dynamic, extensible and fast business intelligence and analytics platform to be used for district wide and operational analytics. The lead projects for this platform will require both predictive analytics, business intelligence and data exploration capabilities. These projects are not yet fully defined and the district is planning on building the dashboards and reports for this outcome internally as needs arise. Vendor's solution should be able to recreate existing reports, but the actual work will be done by district staff.

The second desired outcome is the selection of an easy to use classroom analytics solution. This solution will provide classroom teachers and RTI groups the ability to look at data from both provided (such as state test results and other standardized test) and district generated assessment results alongside demographics and other student data in order to provide the best possible instruction for students. The system must have the ability for staff to create their own reports as well as use contextualized district provided and designed dashboards and reports.

If providers would like to offer development services, they should be specified in the "Optional Services" section.

- 2.3 Question: Under the Predictive Analytics Category: *"This section should include an in-depth description of advanced analytics or predictive analytics capability provided by the solution. It is essential that providers respond in a way that demonstrates the full feature set of the predictive analytics solution and its usability."* Can you clarify whether IUSD is seeking the ability to overlay



a predictive framework by IUSD or offer a pre-determined predictive framework developed by the BI platform?

Answer: IUSD is looking for both the ability to overlay (for classroom analytics) research-based predictive frameworks as well as (for enterprise analytics) the tools to develop new IUSD predictive frameworks using single and multivariate linear, logistic and text analysis, as well as machine learning support.

- 2.4 Question: In review of the RFP, there is little information which can be used as a basis for estimating the services Scope of Work. Is it Irvine USD's intent that we provide only software and installation services, or that we provide turn-key implementation services that deliver specific dashboards, reporting applications and other information components? Please provide the expected scope of services for the project and how many Irvine USD staff, users or students would receive training.

Answer: See answer 2.2.

- 2.5 Question: The RFP references both a hosted and a on premise deployment. Does Irvine USD have a preference as to which?

Answer: Irvine Unified does not have a preference with regards to hosting. Either a cloud hosted or on premise solution will be acceptable.

- 2.6 Question: The RFP references per staff, student, user pricing. Can Irvine USD provide the number of users for each category, type of user?

Answer: IUSD expects roughly 1500 teachers and 300 administrators/support staff to use the system. Expect 50-100 "super-users" that will be modifying dashboards and 3-5 data scientists and developers creating models, dashboards, and reports.

- 2.7 Question: What are the specifications/deliverables for the classroom analytics section of the RFP?

Answer: The purpose of the classroom analytics solution is to provide teachers and site-based administrators with tools to monitor students' progress, identify at-risk students and inform instruction through professional learning community (PLC) activities. Data used will include universal screening assessments (administered three times per year); district, school and teacher-created assessments; third-party assessments (currently Renaissance STAR, EasyCBM, ST Math, and ExamView); Statewide testing data (CAASPP, CEDLT); and behavioral and attendance data. Data must be viewable by district, school, grade-level (district-wide and within-school) and classroom.

- 2.8 Question: Does the district have a specific assessment item bank in mind or are assessments district-created?

Answer: IUSD currently uses a combination of third-party software (see answer 2.7) as well as the Pearson Item Bank aligned to the Common Core. In addition, many IUSD assessments are created in-house by classroom teachers or district curriculum staff. We would welcome proposals for item-bank providers as an optional add-on in the bidders' response and cost form



of the RFP. IUSD's current assessment platform allows for a variety of item types (mirroring those available on the CAASPP test).

2.9 Question: Can you tell us the vendors for SIS and any other systems that would be used?

Answer: SIS – Aeries, State-Testing- CAASPP, CEDLT, Other Assessment – STAR Renaissance, EZ CBM, Schoolnet (Pearson), HR- In-house developed (MS SQL), Financials- BusinessPlus (formerly Bitech), Additional- Custom MS SQL databases.

2.10 Question: How many years of longitudinal data does the district want?

Answer: The district expects a minimum of three (3) years of data available in the solution. However, for some data points (e.g., attendance), the district will expect a longer term.

2.11 Question: The RFP requires 24/7 support. Can the district clarify if this is front-end or back-end?

Answer: District IT staff will be the primary contact for support for all end-users of the system. Only issues that internal staff cannot resolve will be escalated to the vendor's support team. The 24/7 support referenced in the RFP is the expected support provided to IT staff.

2.12 Question: When will RFIs be answered? Will the district post responses right away or all at once at the deadline?

Answer: The district will make its best effort to answer questions quickly to provide vendors time to incorporate responses and clarifications in their responses to the RFP. RFI responses will be posted throughout the open RFI period. However, all RFIs will be responded to by the deadline posted in the Calendar of Events.

2.13 Question: Does the district have a preference for a cloud-based or a on-premise solution?

Answer: The district does not have a preference. For on-premise solutions, the district will anticipate and add costs associated with equipment and staff time to accurately represent and compare total solution costs. Vendors must include specifications for any required or recommended equipment/appliances in their responses to the RFP.

2.14 Question: How many copies of the proposal does the district require?

Answer: Vendors must provide one (1) master hardcopy, four (4) additional hardcopies and one (1) electronic copy (CD, Flash drive). Please see section 2.1, page 7 of the RFP.

2.15 Question: For an on-premise solution, would IUSD be responsible for addressing the security requirements in the RFP?

Answer: The RFP outlines specific requirements for on-premise vs. hosted solutions. Both options must address requirements P3.8-P3.13 ("Requirements for all solutions"). Additional requirements for on-premise solutions begin at P3.14 ("Requirements for on premises solutions"). Additional requirements for hosted solutions begin at P3.16 ("Requirements for hosted solutions").



- 2.16 Question: Are the requirements and scope for this project complete and defined or are they ongoing?

Answer: The classroom analytics portion of the RFP is fairly well defined. The enterprise system is still in flux and vendors should respond anticipating that requirements will evolve during the project.

- 2.17 Question: Does the district anticipate that IT staff will have the ability to extend the system, or should the vendors expect that consultants/vendor staff will be used for ongoing development?

Answer: District IT programming staff will have primary responsibility for ongoing development. However, the district encourages vendors to include services for additional needs (e.g., dashboard or report development) and to include an item/hourly rate as an optional additional cost in the proposal.

- 2.18 Question: What is IUSD's preferred project/implementation approach?

Answer: Generally, IUSD follows an agile development approach. This project will likely follow a modified version of the agile development lifecycle with three-week sprints. Weekly meetings will be required during the implementation phase (remote meetings are acceptable).

- 2.19 Question: Is IUSD looking to source LCAP reporting through the system?

Answer: Not at this time. IUSD is happy with the LCAP reporting available through our current SIS provider.

- 2.20 Question: The district mentioned that the requirements of the classroom analytics scope is fairly locked down. Could you provide additional information?

Answer: The purpose of the classroom analytics solution is to provide teachers and site-based administrators with tools to monitor students' progress, identify at-risk students and inform instruction through professional learning community (PLC) activities. Data used will include universal screening assessments (administered three times per year); district, school and teacher-created assessments; third-party assessments (currently Renaissance STAR, EasyCBM, ST Math, and ExamView); Statewide testing data (CAASPP, CEDLT); and behavioral and attendance data. Data must be viewable by district, school, grade-level (district-wide and within-school) and classroom. In addition to the above, IUSD will look at the ease-of-use for teachers, including the ability to quickly align assessment items to appropriate standards. The ideal solution would also support assessment item error analysis. IUSD would like the ability to see both a confusion matrix for each question (with both rates and counts) as well as rankings on how often questions are missed by both standard and question.

- 2.21 Question: Does the district use a standard or custom framework for determining at-risk status of students?

Answer: IUSD is currently using Schoolnet to identify students who are at risk. IUSD can define its own criteria at this time. The district would like to keep the flexibility to define and revise at-



risk criteria given the unique qualities of our students. IUSD also expects to be able to “tier” students for intervention/at-risk determination.

2.22 Question: What has the district’s experience with Tableau been?

Answer: IUSD has found Tableau to be a powerful data visualization and exploration tool. We’ve had concerns about the user-friendliness of the tool for use outside of the IT/Assessment Staff. A solution like Tableau would be an appropriate component of the enterprise analytics response to the RFP.

2.23 Question: Is the district looking to keep all current source systems, including the Schoolnet assessment system?

Answer: Most IUSD source systems will stay constant. If the provider’s proposed solution is equal to or surpasses our current assessment system (Schoolnet), the district would consider a transition. IUSD has over a year left on its current contract with Schoolnet. Therefore, a transition would not be (or need to be) immediate.

2.24 Question: Are predictive analytics critical for both areas of the RFP?

Answer: The evaluation of predictive analytics will be focused on the enterprise analytics side of the RFP. For this section of the RFP, the district is seeking support for multivariate linear regression, logistic regression, and Poisson regression, text analysis and sentiment analysis. On the classroom analytics side, the district would expect some linear regression or similar capabilities to support teachers and staff in identifying and responding to trends.

2.25 Question: Is the district currently using statistical modeling software?

Answer: IUSD is using SAS, R, and SPSS on a limited basis.

2.26 Question: For the potential multiple awards described in the RFP, how will the responses be scored?

Answer: Each proposal will receive two “full” scores – one for classroom analytics, one for enterprise analytics. Each category (Vendor Support and Ability to Perform, Technical Foundation, Data Modeling and Toolset, Data Visualization and Reporting, Predictive Analytics, Other and Related Systems, Price) will be scored from the lens of classroom use and enterprise use separately. The vendor receiving the highest score for each lens (provided that there are no material deviations from the requirements of the system and RFP) will be awarded a contract. Please see section 3.2 Scoring in the RFP.

2.27 Question: To clarify, might the district award separately for the classroom analytics and the enterprise?

Answer: Yes. Please see response to question 2.20.

2.28 Question: Is it the district’s preference to have a single vendor for both the classroom and enterprise analytics?



Answer: The district's preference is to have a best of breed solutions for both classroom analytics and enterprise analytics; if a single solution can provide that, a single solution will be chosen, otherwise the district may make multiple awards.

2.29 Question: Approximately how many users will there be for each of the solutions?

Answer: Classroom analytics – approximately 1,200- 1,700 teacher and administrators. Enterprise analytics – approximately 300-500 administrators and support staff.

2.30 Question: How many power users and developers will be using the system?

Answer: Approximately 5 developers will be building reports and developing advanced dashboards and models. Approximately 75 power users will be developing and publishing simple dashboard. All other users will be consuming reports will minor customizations/manipulations of data views.

2.31 Question: Is IUSD looking to own the source code of the solution?

Answer: The district is expecting to own our custom data models and custom reporting. However, the district is not expecting to have any ownership of vendor-provided data models, reports and dashboards.

2.32 Question: What data modeling tools is the district currently using?

Answer: Microsoft Visual Studio and Business Intelligence Tools.

2.33 Question: What is the district's anticipated timeline for the decision and implementation?

Answer: Please see section 2.4 (Calendar of Events) of the RFP for the selection timeline. IUSD anticipates Board Award of the RFP on April 12, 2016. The district's implementation timeline is flexible, and will be based on vendor's response and project planning meetings. We anticipate a phased implementation for both sections of the RFP. For the enterprise analytics scope of work, we anticipate phasing in dashboard components/data views according to a district priority list and some already identified quick wins. For the classroom analytics component, we anticipate instead taking a pilot site and/or grade-level/subject area approach.

2.34 Question: How should vendors scope the project in the absence of detailed requirements related to reports/dashboards?

Answer: IUSD will post sample dashboards and additional questions prior to the deadline for RFI responses on the RFP website to provide additional context for vendors. Generally, vendors should anticipate a collaborative development process and may choose to include unit costs for development hours/projects.

2.35 Question: Does the district have a list of quick wins/early dashboards for this project?

Answer: IUSD will post sample dashboards and additional questions prior to the deadline for RFI responses on the RFP website to provide additional context for vendors.



2.36 Question: Will the primary use-case for this project be through a desktop or mobile device?

Answer: Staff will consume reports/dashboards through a variety of devices. Vendors should anticipate supporting mobile devices as a common point of entry. Development staff will use Windows laptops/desktops.

2.37 Question: Will the vendor be able to partner with you on the project?

Answer: The district anticipates a very collaborative, iterative approach to the development of reports, dashboards and data views. Vendor will have access to IUSD subject matter and database/programming experts throughout the project.

2.38 Question: Where is the SIS data located (local or hosted)? Will ODBC access be available to the vendor?

Answer: The district's SIS is on site. IUSD will validate ODBC access/security. Source code for all custom software (industry standard ETL tools are accepted) that uses an ODBC connection to write or update must be available for IUSD inspection, including all release notes and changes for each version.

2.39 Bidders' Conference Participants List

➤ Irvine Unified School District:

- ❖ Jason Miles
- ❖ Brianne Ford
- ❖ Maria Ragas
- ❖ Martin Danko
- ❖ Alyssa Honeycutt

➤ Bidders:

In Person Attendance

- ❖ Diane Wolfe - Scantron
- ❖ Raghu Bala - Quadrant 4
- ❖ Don Hutchings - VersiFit Technology
- ❖ Ashton Chanana - Century Link
- ❖ Mary Reber - Century Link
- ❖ Zoila Martinez - Information Builders
- ❖ Dee Cutler - Information Builders
- ❖ Basit Khan – Slalom
- ❖ Patricia Kwok – Slalom

Conference Call Attendance

- ❖ Mary Helmsworth-Hamby - eScholar
- ❖ Rowan Hinton - EPI-USE America
- ❖ Mike Hadaway - Otis Educational
- ❖ Janice D'Aloia - Momix Solutions
- ❖ Brian White - SAS
- ❖ Steven Pummill - Tandem Conglomerate
- ❖ Benjamin Nah - Tandem Conglomerate
- ❖ Christina Smithers - Versi Fit Technology
- ❖ Jonathan Axtell - SchoolZilla
- ❖ Debbie Obbie - Unknown Company Name