NOEEN
NEW ORLEANS EARLY EDUCATION NETWORK

PROFESSIONAL SERVICES CONTRACT REQUEST FOR PROPOSALS
Unified Enrollment System Development and Common Application Process Enhancements

Due: March 17, 2022

INTRODUCTION & BACKGROUND

New Orleans Early Education Network (NOEEN), an initiative of Agenda for Children and NOLA Public Schools, (NOLA-PS) coordinates services and resources for families and early learning centers in partnership with the Louisiana Department of Education.

Agenda for Children is accepting proposals to contract with a vendor improve and expand the Salesforce platform for the increasing number of early childhood aged children participating in the city's unified enrollment system. This vendor is chiefly responsible for the following scope of work:

- Conduct a comprehensive review of existing functionality within existing platform;
- Provide detailed recommendations of which objects and fields are not in use, or in low use, and which are mission critical;
- Migrate existing Salesforce instance from Sales Cloud to Education Cloud or a similar platform that resolves current hardships and plans for future innovation and growth;
- Transition student and family data to education data architecture (EDA) / K-12 Architecture Kit or similar.

Development will require working with the NOLA-PS Early Childhood Portfolio and Data Systems teams to design and build new functionality and migrate worthy existing functionality to build a modern, flexible system that can grow with the system's needs through the next decade.

Contractors responding to this RFP should be a Salesforce Certified Consulting Partner, have a minimum of five (5) years of demonstrated experience maintaining a Salesforce Service Cloud or similar enrollment platform for a government or private entity, and have a minimum of five (5) years of experience in developing and supporting enrollment or education solutions.

SCOPE OF WORK

At a minimum, the new instance should include the following:

Unified Application Enhancement & User Experience

New parent portal and redesigned application to include:

- An updated portal experience that includes modern standards such as a chat bot to help users through common issues.
- Portal experience designed around the potential actions that need to be taken by the household and associated student(s).
- Redesigned application must be responsive and easily used by mobile users, including ability to launch camera to attach pictures of documents, such as ID, birth certificate, proof of income, etc.

- Detailed logic-based portal experience that changes based on the user's actions and selections
- Two-way communication related to steps in the process, such as early childhood verification and sibling verification, including the ability to upload documents into a workflow for a staff review queue and attach documents to the student's enrollment record
- Improved structure to reflect school-based relationships, such as households rather than a single parent contact.
- The improved structure should be built to make it easier for parents to access the portal and to decrease duplicated contacts records.
- Reimage the school selection process to better account for different priorities, eligibilities, locations, funding sources, and other categories that vary between schools/programs
- Separate the school selection and school ranking steps in the application process
- Migration of portal from Salesforce site to Experience Cloud or similar enrollment platform.

Document collection system within the portal to include:

- Prepare for API connection with external vendor to send information about parent to verify information such as address through access to the family's water bill account online (e.g., Sewerage and Water Board).
- Allow documents to be uploaded for students outside of the application process
- Backend monitoring and staff approval process for reviewing documents, such as rejecting and sending detailed follow-up emails and text messages to parents from the organization. Approval processes should be accessible to school and center staff completing verifications as well as NOLA PS staff

Communication with schools and families to include:

- Varied Channels: option for text messaging (A2P and P2P) and email
- Language Accessibility: Texts and emails should be sent in the language that the application was completed in with no additional action required by administrators or families. Families should also have the option to select the language that they receive texts and emails in from the Parent Portal.

Student Information System

- Provide historical information regarding primary student ID consolidations//updates to school users.
- Provide greater access to parent contact information for school users (contact, user, etc).

Coordinated Information Campaign

- New platform will include text message (A2P and P2P) and email supports for two-way communication with families.
- Training materials for how multiple audiences can access the system successfully and effectively.

Family-Facing Communications, Supports & Access

- Configure Single Sign On (SSO) and One Time Password (OTP) portal authentication
- Migrate existing workflow rules for email communications to new solutions. Ensure communications avenues are flexible and new pathways can be built in-house to account for future developments and changes to the process (such as ability to leverage outside data to target potential groups).

- Informed two-step selection process will include a redesign of the school list function and a new approach to how families choose schools within the application.
- Include two-way texting in the applicant's preferred language from the new platform
- Implement Education Data Architecture (EDA) or similar

SPECIFICATIONS

Overview

- The Contractor will provide a detailed diagnostic of the current instance, applications for new solutions that will meet current and future needs, and a detailed plan for migrating the current instance to the new instance as well as oversee the migration and agreed upon training on the new instance.

- The Contractor will refactor code of migrated Apex classes and visualforce pages to modern standards and ensure that APIs are updated as needed

- Student confidentiality and privacy must be maintained in accordance with state and federal regulations, including but not limited to the Family Educational Rights and Privacy Act. Confidentiality agreement with NOLA-PS will be required.

- The Contractor must operate within all legal parameters, in accordance with all applicable state laws (including all relevant sections of Title 17), federal laws (to include but not limited to: The Elementary and Secondary Education Act of 1965, Individuals with Disabilities Act, Civil Rights laws, Every Student Succeeds Act), and Orleans Parish School Board policies.

Development Requirements

- The Contractor will conduct development work pursuant to the accompanying scope of work, in service of improving equity and access to enrollment in New Orleans public education programs. Development requirements include but are not limited recommendations for seamless migration from existing:

    - Salesforce custom objects
    - Salesforce modules
    - Visualforce pages/components
    - Workflow processes
    - APEX classes
    - Test cases to ensure sufficient coverage

- The contractor's development team will also provide support related to enhancements and recommendations for development work conducted by the client team.

- The Contractor will develop and manage project scopes of work, level of effort estimates, development timelines, promotion of development to production for release, and user acceptance criteria testing scenarios.

- The Contractor will provide weekly or biweekly progress updates on requirements and remaining development hours.

- The Contractor will provide Agenda for Children and NOLA Public Schools with complete documentation on all deployed development projects to include user guidance, technical

specifications including all terms, fields, objects, etc. created by vendor, and including maintaining a code repository specific to the instance of the application that is being supported.

Support Requirements
The Contractor will make staff available to assist with investigating and resolving issues related to development and/or enhancements completed during the scope of work for up to six months after the development is completed.

PROPOSAL FORMAT

Submitted applications must follow the format outlined below and include all requested information.

1. Application
    a. Cover Letter – Must include the name, address, and telephone number of the vendor, and must be signed by the person(s) authorized to represent the vendor.

    b. Company Information – Provide the following information about the vendor:
        i. Name of vendor's representative designated as the contact and email address
        ii. Name of project manager, if different from the individual designated as the contact

    c. Table of Contents – Clearly identify material contained in the application by section.

    d. Approach and Methodology – Provide overall approach to Project Management to include project schedule and coordination, project management tool(s) or style used, visual representation, cost control strategies, quality control system, explanation of UAT process used including timeline and process for incorporating corrections. Emphasis should be given to demonstrating the project documentation process, including presenting final documentation for a sample project. Contractors should review the Scope of Work in detail and indicate how the Contractor past professional experience relates to this project. Examples of previous projects that are like some of the proposed projects should be included. Approach should also include a timeline of key project milestones.

    e. Vendor Organization – Provide a statement of your vendor's background and experience related to developing enrollment or education solutions and providing similar services to public/private organizations, if any. Describe the technical capabilities of the vendor and the vendor's exposure to working with school districts and student enrollment data. Describe your vendor's experience integrating data systems with Salesforce and third-party tools with Salesforce using API or add-ons from the AppExchange. Describe vendor's experience creating and/or modifying Visualforce pages, Apex classes, and using Lightning web components. Provide references of other, similar projects including contact name, title, and telephone number for all references listed. Contractors responding to this RFP should be a Salesforce Certified Consulting Partner, have a minimum of five (5) years of demonstrated experience maintaining a Salesforce Service Cloud or similar enrollment system for a government or private entity, have a minimum of five (5) years of experience in developing and supporting enrollment or education solutions.

    f. Assigned Personnel – Provide the following information about the staff to be assigned to the project:

i. List all key personnel assigned to the project by level and name i.e. Project Team. Provide a description of their background, along with a summary of their experience in providing similar services for governmental agencies, and any specialized expertise they may have. Experience with Education Cloud, Experience Cloud or similar enrollment platforms should be demonstrated. As well as experience migrating older instances to newer functionality.
ii. Background descriptions can be a resume, CV, or summary sheet. Substitution of project manager or staff will not be permitted without prior written approval of the assigned program managers from Agenda for Children.

g. Retention of Working Papers – All working papers are the property of the Agenda for Children. Include a statement acknowledging that if your vendor is awarded the contract, you will retain project related papers and related reports for a minimum of five (5) years.

h. Subcontractors – List any certified and licensed subcontractors that will be used, the work to be performed by them, and the total number of hours or percentage of time they will spend on the contract.

i. Breakdown of Cost – Detailed breakdown of project cost.

2. Additional Data – Provide other essential data that may assist in the evaluation of the application (e.g. green business certification, etc.).

PRESENTATIONS

Agenda for Children at sole discretion may invite proposer(s) to provide oral presentations to justify how their vendor proposes to meet NOEEN's objectives within the RFP. Commitments, if any, made by the Proposer at the oral presentations will be considered binding.

Each vendor should be prepared to conduct a ZOOM presentation to the Evaluation Committee. The presentations must demonstrate that the vendor clearly understands the requirements of the solicitation and has a strategic plan and approach to complete the work. Vendors presenting will be allotted time 60 minutes as defined below. Dates/times are final unless changed in the best interest of Agenda for Children. Exact dates and times to be determined.

Schedule is as follows:

- 5 minutes for Agenda for Children Evaluation Committee and Vendor brief introductions
- 25 minutes for presentations demonstrating vendors' qualifications and expertise with the requirements of the solicitation services
- 20 minutes for questions/answers
- 10 minutes closing/final comments

APPLICATION SUBMISSION FORMAT

Please save the document as a single PDF file and name the document: 'CONTRACTOR_Enrollment_Application_2022.pdf.'

Submit completed application as an attachment to noeen@agendaforchildren.org by March 17, 2022, at 5:00 p.m. Questions can be directed to **noeen@agendaforchildren.org**.

EVALUATION AND SELECTION

Agenda for Children and OPSB/NOLA Public Schools will evaluate applications based on team evaluation of application and presentation, including qualitative metrics. This includes our review of the applicant's application and related materials for evidence of prior experience, value-added services beyond the scope of work, qualifications of staff to be assigned to the project, cost effectiveness, and the Proposer's completeness and timeliness in its response to us. The contract will go to the lowest and best bidder. Bids will be reviewed and made available to any bidder upon request.

PROPOSAL TIMELINE

February 18	Agenda for Children releases the Request for Applications for Unified Enrollment System Enhancements.
March 8	Open Office Hours Questions and Answers Session (Optional); email NOEEN@agendaforchildren.org for zoom link
March 17	Applicants submit final application via PDF file attachment.
March 18	Applicants invited to participate in applicant presentations.
March 22 & 23	Applicants present to evaluation team.
March 25	Agenda for Children notifies applicants of contract award determination.