REQUEST FOR INFORMATION

Arlington Public Schools
Purchasing Office

RFI TITLE: CONSTITUENT MANAGEMENT SYSTEM

RFI NUMBER: 47FY17

RFI ISSUE DATE: JANUARY 5, 2017

INFORMATION DUE DATE AND TIME: JANUARY 19, 2017, PRIOR TO 2:00 P.M.
(LOCAL PREVAILING TIME)

This is Arlington Public Schools (APS) Request for Information (RFI) #47Y17, issued January 5, 2017. Sealed Information must be received and time stamped, or signed in, prior to 2:00 PM on January 19, 2017 (collectively the “Information Due Date”). Vendors are responsible for ensuring that the Purchasing Office receives their Information submission at the Information Due Date. The time the Information is received shall be determined by the time stamped on the Information receipt by the time clock in the Purchasing Office. The APS Purchasing Office is located on the fourth floor of the Arlington Public Schools Education Center, 1426 N. Quincy Street, Arlington, VA 22207. The APS Ed Center is now a secure facility and Vendors may enter only through Door # 1 on the 1st Floor near the David M. Brown Planetarium. Vendors may be asked to sign in with the receptionist before being allowed to the 4th Floor. Vendors must allow sufficient time to clear the sign in process to complete the Information process prior to Information Due Date. Delivery to, or receipt by, any office other than the APS Purchasing Office shall not be deemed receipt by the APS Purchasing Office until actually received in the APS Purchasing Office. The Vendor assumes all risk of delivery to the correct office.

In the event this time clock is not functioning, the time shall be determined by time displayed on the wall mounted clock located between rooms 405 and 406. The time on the wall mounted clock will be written on the Information receipt by hand, by Purchasing Office personnel. Information received at or after 2:00 P.M. on January 19, 2017, shall not be considered. If the APS Education Center is closed for any reason on the Information Due Date, the Information Due Date will be extended to 2:00 PM on the next business day the APS Education Center is open.

QUESTIONS/REQUESTS FOR CLARIFICATION:
All questions/requests for clarification shall be submitted by email, addressed to Joshua Makely at joshua.makely@apsva.us and to be assured consideration, must be received prior to 4:00 PM, January 9, 2017. After reviewing any questions/requests submitted, the Purchasing Office will issue an Addendum to respond to items it deems necessary. Changes to this RFI will be made only by written Addendum issued by the Purchasing Office and designated as “Addendum No.”

INFORMATION SUBMISSION ADDRESS:
Information is to be submitted by mail, hand delivered or express carrier to:

Arlington Public Schools,
Purchasing Office, 4th Floor,
Attn: Joshua A. Makely, CPPB
1426 N. Quincy Street,
Arlington, VA 22207
ADDENDA:
All Addenda will be posted on the APS website at [https://www.apsva.us/purchasing-office/current-solicitations](https://www.apsva.us/purchasing-office/current-solicitations) and the eVA website at [www.eva.virginia.gov](http://www.eva.virginia.gov)

Vendors shall ascertain prior to submitting Information that all Addenda issued have been received and shall acknowledge receipt and inclusion of all Addenda by marking here:

Addendum #. _____ Date: _______ Addendum #. _____ Date: _______
Addendum #. _____ Date: ______

INFORMATION SUBMITTED BY:

Full Legal Name of Vendor: ____________________________________________

Mailing Address: _______________________________________________________

Remittance Address (If Different): _______________________________________

__________________________________________

__________________________________________

__________________________________________

Phone: (____) ___________________________ Fax: (____) _______________________

Email Address: _________________________________________________________

Contact Person: _______________________________________________________

Typed/Printed Name: ___________________________________________________

Signature: ___________________________________________________________

Date: ______________________________

APS does not discriminate against faith-based organizations – Virginia Public Procurement Act, § 2.2-4343.1
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Section Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVER SHEET</td>
<td>1</td>
</tr>
<tr>
<td>1.0 GENERAL INFORMATION</td>
<td>4</td>
</tr>
<tr>
<td>2.0 BACKGROUND</td>
<td>4</td>
</tr>
<tr>
<td>3.0 DISCLAIMER</td>
<td>5</td>
</tr>
<tr>
<td>4.0 STATEMENT OF NEEDS</td>
<td>5</td>
</tr>
<tr>
<td>5.0 DEMONSTRATIONS/PRESENTATIONS</td>
<td>6</td>
</tr>
<tr>
<td>6.0 COSTS</td>
<td>6</td>
</tr>
<tr>
<td>7.0 SUBMISSION REQUIREMENTS</td>
<td>6</td>
</tr>
</tbody>
</table>
1.0 GENERAL INFORMATION

Arlington Public Schools (APS) is soliciting Information from Vendors authorized to provide a commercial off the shelf (COTS) Constituent Management Systems (System). APS’ primary need is for the System to serve as a central repository of all contacts received by the School Board (Board) office, to include (but not limited to) emails, phone calls, letters, and walk-ins. The System needs to have the capability to track each interaction in a filing/identification system that facilitates responding to every communication received. In particular, the System needs a mechanism that allows APS to easily keep track of messages forwarded to other departments and to follow up with those departments as needed to ensure the requested response was provided. All Board members and selected staff must be able to access the system – with differing levels of authority based on their role. At a minimum, a user should be able to view and follow an entry’s progress through the system to ensure it is acted on and closed within the identified timeframe.

2.0 BACKGROUND

APS represents one of the nation’s most diverse and sophisticated student populations. Its twenty-six thousand, one hundred and fifty-two (26,152) pre-K through grade 12 students come from around the world and speak ninety-nine (99) languages. APS operates more than thirty (30) schools and programs designed to meet individual student needs. APS serves Arlington County which is located in northern Virginia, directly across the Potomac River from Washington, D.C., and encompasses twenty-six (26) square miles of land.

APS has identified the following needs of the System:

GENERAL REQUIREMENTS:
• Key information and details: a System to manage basic information about the constituent and the response needed
• All messages received and sent should be archived/accessible
• A System that is not too complex and is appropriate to the volume of email/contacts received
• Provides accessibility to emails/communications for staff
• Ability to run reports based on identified parameters such as correspondent, school, topic, zip, etc.
• Auto-response acknowledging initial email receipt
• Technology that is compatible with APS systems and will be regularly supported, maintained and updated, with ongoing training as needed
• Ability to access system remotely – i.e. web-based

SYSTEM NEEDS:
Simple data entry for logging in communications information:
• Constituent information: name, email, phone, address, affiliation (i.e. school, PTA, etc.)
• Message coded according to subject, key word – i.e. primary topic/concern
• Option to list secondary concern(s) if more than one is included in the contact
• Option to limit access to the communication received and the response sent if it should be restricted – i.e. confidential (student info, legal, etc.)

Incoming contacts/types of communications received:
• emails
• letters
• phone calls
• in person requests

Tracking features needed:
• Date received
• Date response sent
• Date forwarded to staff
• Date response from staff due
- Response received from staff
- Option to review all responses prior to sending to constituent
- Automatically keeps track of email follow ups
- Ability to remind staff if response not received within established timeframe

Types of Responses sent:
- Automatic reply/acknowledgment when message received
- Simple acknowledgment from Board office staff of receipt
- Response to question/concern from Board staff
- Response to question/concern from Board Chair, drafted by Board staff
- Response drafted by Board member/Chair
- Other Staff generated response
- Ability to generate personalized update message to be sent to correspondents on a specific topic:
  - Automatically generates email groups/lists based on topic assigned to message
  - Eliminates duplicates if there are multiple contacts from a single individual

Users/Viewers/Reporting:
- Primary users – SB office staff – should have full access
- Board members must be able to review all communications received, sent
- Other users and access levels – to be identified/confirmed:
  - IS staff – for support
  - Superintendent’s staff
  - Executive Leadership Team?
- Mechanism/report capability to identify what emails need reply/follow up
- Generate a daily report or ‘digest’ of messages received to keep Board informed/aware
- Option to analyze messages received – i.e. generate report providing number of messages on specific topic, overview of messages received within in a given timeframe, etc.

Additional possibilities/considerations:
- Include a mechanism to facilitate responses to forms submitted through Web site – for example, advisory applications, speaker requests, etc.
- Tracking of messages sent to numerous recipients (i.e. each Board member) to limit sending duplicate responses
- Support for managing emails sent to individual Board member accounts – to ensure that all Board members are aware of constituent concerns/contacts
- Capability to identify emails that are forwarded automatically through outlook of the Individual School Board member accounts to the common school board account and have specific workflow associated to it.

3.0 DISCLAIMER

This RFI is issued solely for Information and planning purposes and does not constitute a solicitation. Information submitted in response to the RFI will not be returned. Information received in response to this RFI are not offers and cannot be accepted by APS to form a binding contract. Vendors are solely responsible for all expenses associated with responding to this RFI.

4.0 STATEMENT OF NEEDS

4.1. Goals of Project

APS is seeking a solution to support prospective and current constituents spread across various stakeholder groups to continue greater engagement and transparency of various operational and project based initiatives and programs. APS is looking for a solution that could be integrated with current systems in place and provide a simplified and yet effective support to the existing and continuously improving processes around constituent management. The goal of this RFI would be to review the different COTS Systems available and establish which
one(s) meet the needs of APS.

4.2. **Statement of Qualifications**

Responses shall contain, at a minimum:

4.2.1. A description of the Vendor’s experience in projects providing implementations, customizations and configurations to COT System(s). Vendor shall specify an individual contact person who will represent the interests of the Vendor in the referenced projects, including the individual’s email address, mailing address, and telephone number. APS will not contact any references without the prior written approval of the Vendor.

4.2.2. A description of the COTS System the Vendor will provide.

4.2.3. A concise solution statement of no more than nine (9) typewritten pages, which is included in the ten (10) page limit noted in Section 7.3, describing how the Vendor’s COTS System will operate, support, or perform in delivering a solution which meets the Goals of Project in section 4.1.

4.2.3.1. If the Vendor is providing services, how and by whom service management would be performed; and

4.2.3.2. If the Vendor is providing equipment, how and by whom the hardware would be monitored and maintained.

4.2.4. A statement of Vendor’s capabilities that describes, among other things, lead times for products, providing services, and delivering equipment.

4.2.5. A statement regarding estimated pricing for delivering and implementing the solution, including costs related to Hosting and SaaS, should you be proposing those services. Please include software licensing costs and identify if said licenses are named or concurrent users. This estimate will be a non-binding estimate, for budgeting purposes only.

4.2.6. APS requests responders to recommend what statistics, documentation, and information APS should furnish in a future RFP and what the significance or criticality of that information is to the success of the procurement. There is no guarantee APS will issue an RFP following the receipt of Information received in response to this RFI.

5.0 **DEMONSTRATIONS/PRESENTATIONS**

APS may request a presentation or demonstration to determine if Information or suggested solutions will be sufficient to APS requirements. Vendors should be prepared to give a presentation or conduct demonstrations sometime shortly after the Information Due Date. The date, time, and location of any presentations or demonstrations will be specified only to those Vendors submitting Information on a COTS System which APS considers may meet its requirements.

6.0 **COSTS**

All costs for submitting Information and/or conducting any demonstrations as result of this RFI are the responsibility of the Vendor.

7.0 **SUBMISSION REQUIREMENTS**

7.1. **Submission Requirements**

One (1) Original, so marked, and two (2) copies, so marked, for a total of three (3) copies of your Information are required. Vendors are to submit Information in sealed envelope(s) and put the RFI number, title, due
7.2. **Use of Information and Documents**

APS and its officials, employees and agents will copy and use the Vendor’s Information, for various purposes related to analysis, evaluation, and decision for developing a future solicitation. Information shall be the property of APS. The Vendor is responsible for obtaining any necessary authorizations for all such use of the Information, and for ensuring that such copying and use is in conformance with laws related to trademarks and copyrights. Any Information for which the Vendor has not obtained such authorization, or for which such copying and use is not authorized, shall not be submitted. The Vendor agrees to indemnify, defend and hold APS, its officials, employees and agents harmless from any claims of any nature, including claims arising from trademark or copyright laws, related to use of information submitted by Vendors.

7.3. **Format and Content**

Submissions should address the statement of needs in Section 4.0. Submissions should provide straightforward and concise responses to qualifications requested in this RFI. Submitted materials must also document a clear understanding of the APS’ goals, and a demonstrated ability to deliver the System. Information shall be limited to a maximum of ten (10) typewritten pages, in double-spaced, 8 ½” by 11” format, with 1” margins, and a font point size between 10 and 12.