Data Analysis, Visualization, and Content Development Services RFP
Questions and Clarifications
August 19, 2020

Below are the CCEE's responses to questions and requests for clarification that CCEE received from prospective Respondents by the deadline of August 14, 2020, at 4 p.m., regarding the Data Analysis and Development Request for Proposals ("RFP") issued on August 3, 2020. For any questions and requests for clarification that were submitted after the deadline, CCEE cannot guarantee that such questions and responses are included herein. CCEE staff has endeavored to respond as thoroughly as possible, and cited relevant language from the RFP where appropriate. Questions and requests for clarification that are similar or on the same topic have been grouped together for ease of navigation and response. Questions that were submitted are not necessarily provided verbatim, and may have been edited for clarity, but have not been altered in substance. Respondents will be presumed to have read and understood the responses provided herein upon submittal of a Proposal.

OVERALL

- Is the expectation that the use of the data and web system be widely supported to all districts (i.e., materials, professional development, promotion) or limited to just local educational agencies ("LEAs") that are being directly supported by CCEE and/or county offices of education ("COEs") that are providing differentiated support?

  RESPONSE: The project described in this request for proposals is for a database, analytic support, and tools to support internal CCEE staff capacity and project needs, but any resultant resources may be made publicly available.

BUDGET

- Does the CCEE have a general range for the budget amount for submissions under the Data Analysis and Development RFP?
- Are you able to share an estimated budget for this work?
- Has a budget ceiling been set? If so, would you please share it and how it was determined.
- Is there a maximum allocation for the overall project?
- Is there an approximate budget that you can share as part of this work?
- What is the budget CCEE/MCOE have planned for this work by June 30, 2021?

  RESPONSE: CCEE does not have a set budget for this project and anticipates that there will be variations depending upon the approaches that Respondents may take to address the requirements set forth in the RFP. We have asked Respondents to provide an annual breakdown of the proposed fees and costs (including for organization personnel) for their proposed scope of work. The total annual fees and costs must be stated as a "not to exceed" amount. Respondents should describe their willingness to commit to the estimate provided, and what factors may influence the estimate in the event of programmatic changes. A general range of $100,000--$250,000 was anticipated for the 2020-21 fiscal year depending on the approach and final deliverables, but further negotiations may be needed once the initial Proposal reviews are conducted. CCEE will be making final decisions based on the content and deliverables included in the submitted proposals.

As indicated in the RFP, due to the year-to-year nature of the CCEE's funding, the contract with the selected Respondent(s) will necessarily be written such that it is fiscal year-to-fiscal year with the ability to extend it to the next fiscal year at the exclusive option of the CCEE. Respondents' cost estimates may be a factor in awarding the contract. Since an RFP is not required, the CCEE/MCOE is not obligated to accept a bid based on cost estimates.

- Can indirect costs be charged? If so, at what rate?

   RESPONSE: CCEE does not allow Respondents to charge for indirect costs as a line item.

- Is the underlying funding for the project based on an ongoing appropriation, or one-time funds?

   RESPONSE: The funds identified for this project come from funds identified in the CCEE annual Budget for the support of internal capacity to support technical assistance and professional learning needs.

- Should our cost estimates be based on an entire year, or be prorated based on the remaining 2020-21 fiscal year (E.g., Work begins 9.21.20 through 6.30.21)?

   RESPONSE: Cost estimates should be based on the time anticipated to complete the project, beginning no earlier than September 21, 2020 and running through June 30, 2021. Respondents may elect to include cost estimates for activities in subsequent years depending on their proposed scope of work.

- Are you open to a fixed-price deliverable budget for database development, standardized profiles and website, from which CCEE can choose those that meet their needs at different points during the relationship? We realize that this is likely not feasible for office hours/consultation.

   RESPONSE: Respondents may elect to submit fixed-price deliverable-based budgets for database development, database profiles, and the online tool.

DATA PROFILES
- On page 4 the RFP references "ad hoc 'data profiles.'" Can CCEE provide access to one or more existing ad hoc data profiles?
- Approximately how many ad hoc reports are provided as part of technical assistance with LEAs?
- Can you provide more detail on the type of format and flexibility required for the data profile template? Should this be a completely blank template in a formatable shell, like Excel, or the actual database itself with a clear indication of how to populate with new public data?
- Can we view an example of the existing "ad hoc data profiles" mentioned in the RFP (page 4) that serve as the starting point for the newly developed "standardized LEA data profiles" required under the scope of the RFP (page 5)?
- Can you define "standardized LEA data profile templates"? Is it a dynamic profile on an interactive website? Or will it require a report with multiple tables, charts, and/or visualizations in printable format?
- What patterns or conclusions is CCEE hoping to derive from this data that cannot already be done from these public dashboards?

   RESPONSE: The ad hoc data profiles that are referenced in this RFP refer to various internally created spreadsheets, charts, and graphics that have been tailored to specific project needs

identified by LEAs we have worked with. CCEE is not looking for a contractor to replicate or develop any specific template, but will work collaboratively to identify needs and develop data visualizations that can support LEA data inquiries using publicly available data sources as identified in the RFP.

- Must the "standardized LEA data profiles" include narratives that are generated per LEA?

  RESPONSE: There is no requirement for the LEA data profiles to include narratives specific to an LEA, but CCEE may be interested in proposals that include this capacity.

- Approximately how many total "standardized LEA data profile templates," ad hoc reports, and analyses are anticipated as part of the project?

  RESPONSE: Once a standardized data profile template is created, CCEE anticipates that there may be circumstances during which the templates may be used to create additional reports. Examples of these might be reports that use data that is more current than those which are posted publicly, or to look at a subset of schools within an LEA. Currently, CCEE works with about a dozen LEAs to provide ongoing technical assistance and direct support. CCEE suggests that proposals may include fixed-priced budgets per report or hourly-based budgets for additional reports and ad hoc analyses.

- What types of requests does CCEE anticipate fielding from LEAs or consortia of LEAs?
- What process does the CCEE anticipate will be used in order to:
  a) Field requests from LEAs or consortia of LEAs for ad hoc reports; and/or
  b) Approve or disapprove requests from LEAs or consortia of LEAs for ad hoc reports?

  RESPONSE: The purpose of this RFP is to identify one or more contract team(s) to build CCEE's internal capacity to provide support and technical assistance to LEAs around data inquiry. This may include the development of ad hoc reports to support an LEA that the CCEE is working with, and the inquiry to develop these reports would be made by CCEE. The purpose of this RFP is not to provide tailored analytic services widely to any/all LEAs.

- Does the project require that data profiles/ad hoc reports be embedded into the CCEE website or can profiles/reports be on a standalone website that links to CCEE?

  RESPONSE: The RFP does not indicate any preference for where the resultant data profiles and ad hoc reports be stored. However, they must be easily accessible for use by the CCEE internal team and be made accessible to others as identified by CCEE, including being made publicly available. To facilitate their use as a technical assistance tool, CCEE anticipates that data profiles and ad hoc reports should be printable and/or importable into documents, presentations, or other means of communication.

- "Real-time current data" was mentioned - what data refresh rates need to be supported for "real time"? Daily, hourly, other? Can you specifically identify what data and data sources would fall into the "real time" category?
- The RFP references "Reports may include, but are not limited to, standardized layouts that will be adapted and modified to use real-time current data."
  a) Which "real-time" data elements does CCEE anticipate being incorporated into the data profiles?

b) At what frequency would these "real-time" source data elements be updated?
c) Is CCEE responsible for providing access to all the source databases and files for "real-time" data elements including necessary permissions and agreements with the LEA to access such data?
d) Do any of these real-time data elements include information from individual students' educational records, which would be subject to FERPA requirements?

RESPONSE: The RFP's mention of reports that may include real-time data (Section IV.B. Data Profiles) refers to instances where an LEA that CCEE is working with may want to provide more current data than those data that are publicly available to include in a report or analysis.

DATA SOURCES

- Is CCEE responsible for providing access to all of the source databases and files to the Project Team?
- For the data from the 3 sources cited (CA Dashboard, Data Quest, and Ed Data), can you provide details on what the format will be? For example, 10 CSVs vs. 100 CSVs vs. a database dump.
- Will the entities that run the named data sources assist with getting access to data feeds, exports, or APIs.?

RESPONSE: CCEE anticipates that the identified contract team(s) would access the necessary data files in the formats in which they are available to the public.

- The RFP cites sourcing only publicly available data. Is CCEE interested in being able to drill into the data to a more detailed level in the future? If so, how deep would the data level be? (e.g. Aggregated data level, de-identified student data, or personally identifiable information ("PII") data)

RESPONSE: The current RFP is only focused on accessing those data that are publicly available. CCEE does not anticipate developing large scale student-level databases for this current project.

- Does CCEE have any specific data systems they are targeting for use beyond The California School Dashboard, the CAASPP Database, DataQuest, and EdData?
- Are there specific data points that the solution will need to reflect beyond student data? For example, will climate survey results or college and career readiness data be included?
- What data will likely be imported for real time reporting in a future phase? Will this data be from every LEA in California?

RESPONSE: CCEE would be interested in proposals that include the incorporation of other publicly available data to support LEA analyses of school and student outcomes, but is not targeting any specific data sources beyond those named in this RFP.

- Does CCEE plan to incorporate Early Learning Data in either of the following areas?
  a. Early Learning Data (dashboards) for districts serving TK-3rd grade
  b. Early Learning Data for districts serving birth to 3rd grade

RESPONSE: CCEE does not have any plans currently for incorporating Early Learning Data. While CCEE does not exclude the possibility of moving in that direction at a later date, the current RFP does not require the inclusion of Early Learning Data.

- Does CCEE have an ideal frequency with which the data extracts need to occur?

  RESPONSE: CCEE anticipates that the project would require the most currently available data available through the sources identified in the RFP.

DATABASE

- Does the database need to be an internally facing structure used to store district and school data or does it need to be a public-facing structure that can be queried, organized, and viewed by all stakeholders?

  RESPONSE: The work identified in this RFP is for a database to support internal CCEE project needs, but any resultant resources may be made publicly available. Respondents with the capability to develop public-facing structures that can be queried are encouraged to indicate their capabilities.

- What is the expectation regarding supporting this tool and data integration after completion of the contract? Would the Marin COE staff do it, or it will be contracted to the vendor that developed this tool?

  RESPONSE: Section IV.A. (page 5) of the RFP states that "Respondents must speak to their ability to maintain the database for the duration of the contract, and upon completion, or termination, provide supports to transfer the database over to the CCEE or another entity identified by the CCEE." We anticipate any integration supports would be included in this transfer upon contract completion.

- Also, has CCEE or Marin County worked with any systems integrators, consultancies, or other relevant parties (such as the Ed-Fi Alliance or IMS Global) while envisioning the architecture desired?

  RESPONSE: CCEE has not engaged with any parties to envision any systems architecture.

- Do we need to consider providing data feeds or APIs that provide access to the data in the database to other agencies or entities?

  RESPONSE: CCEE is looking for the Respondent to provide API integration that allows for the capability to push and pull between the data system and other systems. The initial launch of the data sources will not require this function, but over time, we anticipate the need to integrate with other systems such as the website and other systems (e.g., large data pull to support data analytics).

CUSTOM DEVELOPMENT VS. EXISTING TOOLS

- Will CCEE consider similar work already completed elsewhere in regard to meeting the requirements of the RFP in this regard?
- Is there a preference for a commercial off-the-shelf ("COTS") solution that you would pay annually as a subscription, or is your preference to use an open resource that would potentially not be subject to ongoing subscription fees?
- Can off-the-shelf software such as Power BI, Tableau, or Microstrategy be used for visualizing and displaying data profiles and reports?

RESPONSE: CCEE is looking for applications that support the development of a database or process by which data profiles/analyses could be developed/conducted to support internal projects using publicly available data. CCEE does not have a preference for the type of solution offered as long as it can support the needs as outlined in the RFP.

- If our license pricing model is per student, how many student records will be imported into the solution?

  RESPONSE: CCEE is not looking to build any data systems including data at the student level. Only data that is publicly available should be considered.

WEBSITE/ONLINE TOOL

- What are the accessibility requirements applicable to the project website and reports?
- Are there any technology or accessibility standards with which the website and database must comply?
- We assume that the website and associated reports and dashboards need to meet accessibility requirements - please confirm, and if so at what level?

  RESPONSE: The website, associated reports, and dashboards will need to meet the accessibility requirements of California Government Code section 11546.7 and Content Accessibility Guidelines 2.1 Level AA, or a subsequent version that may be developed during the course of the contract, and Section 508 of the Rehabilitation Act.

- What do you expect users to be able to do on the site? As an example, we could host standardized profiles with links for people to download, a business intelligence tool to display Local Control and Accountability Plan ("LCAP") metric data for all LEAs where users could navigate to their geography, or a fully customized site.

  RESPONSE: This RFP requests solutions for including an interactive data tool reflecting the data elements that will be developed collaboratively for the data profiles in Section IV.B. Data Profiles (page 5 of the RFP), to be made accessible through the CCEE website. At a minimum, it should allow for accessing the LEA profiles' elements, but CCEE would be interested in proposals that include interactive analyses using the available data.

- Aside from integrating with CCEE's website, do you have any other requirements for the website build? For instance, will this be available to the general public or will there be a sign-in requirement?
- Does CCEE want to control, in any way, the application process for licensing individual users?
- Is the expectation that the solution's reports will be entirely public-facing (no login credentials required)? If so, will an ad-hoc reporting tool need to be accessible by the public?
- How many users will likely need login credentials for access to secure reports and other solution tools?

  RESPONSE: The CCEE requests proposals that include the development of an interactive data tool/dashboard reflecting the data elements to be identified as part of the LEA data profiles. This tool/dashboard will need to be integrated into, or be accessible through, the CCEE website. As the data profiles will only include data that is publicly available, CCEE does not anticipate the need for any sign-in requirements at this time.

- Who do you anticipate to be the primary users of the website? Can you share an example use case of the user profile?
- Which administrative positions within a school district does CCEE envision utilizing the proposed data analytics tool? Does CCEE envision the tool be utilized by charter schools as well?
- Is the website intended to be open access, for public use? (i.e., no registration and/or approval process is needed, or is optional).

  RESPONSE: Within CCEE's technical assistance activities, CCEE primarily works with LEA leadership teams to support system-wide decision-making. CCEE anticipates that these will be the primary audiences for the tools and supports identified within this request for proposals.

- Do the website and associated report/dashboards need to be available in non-English languages? If not, should provisions be made for translation (i.e., the application is ready for translation/localization)? If yes, what languages are priorities?

  RESPONSE: CCEE is not requiring that translation services be included with the proposals submitted in response to this RFP, but translation may be needed for certain ad hoc projects to support a specific LEA. Considerations for translation supports may be included in submitted proposals.

- **What level of support is CCEE anticipating for end-users?**

  RESPONSE: The primary end-user for this project is CCEE staff, which in turn works with LEA leadership teams to support system-wide decision-making. As part of this RFP, CCEE requests adequate support in order to utilize and implement any tools and resources developed.

PROFESSIONAL LEARNING

- Can you further describe the scope of support you envision the contractor providing for the development of professional learning modules, sessions, and guides? Will the contractor be expected to take the lead on development of materials or play a supporting role?

  RESPONSE: CCEE anticipates that contractors will have varying approaches to developing and providing support for professional learning resources and sessions. CCEE encourages Respondents to submit responses that speak to their capacities and expertise in developing and delivering professional learning resources to support the work identified in the RFP.

- Approximately how much consultation/office hours support do you anticipate as part of this contract?

  RESPONSE: CCEE does not have an anticipated amount of consultation/office hours support. Respondents may elect to submit a proposal including a per-hour cost for consultation/office hours support or a fixed-price budget for specific activities and/or number of hours of support.

PROJECT TIMELINES

- Does CCEE have any timelines they are working to meet with regard to the delivery of the scope and services outlined in the RFP, especially regarding the completion of the database, data profiles, and website development?
- What is the expected completion date for:

a. Database?
        b. Data profiles?
        c. Website?
        d. Professional learning resources and modules?
- The project is anticipated to start on September 21, 2020 – can you share more about timing for deliverables? Do you anticipate the selected partner to deliver reports at the end of the contract or before that?
- The timeline makes it seem like launch is required by June 2021. Do you have a target launch date and, if so, are there any specific drivers behind that date?

    RESPONSE: Timelines may be contingent upon the activities and deliverables proposed. However, CCEE prefers to have tools that may be available to support its technical assistance work in 2020, with final deliverables completed by June 30, 2021.

- According to the RFP, the LEAs should use this tool for developing the Continuity and Attendance Plan for the 2020-2021 school year. Do we have a specific timeline to develop the tool to full functionality within the contract period?

    RESPONSE: The RFP does not indicate that any of the data tools developed through this RFP will be used to develop the Learning Continuity and Attendance Plan for the 2020-21 school year. Information about the Learning Continuity and Attendance Plans are provided solely for the purpose of providing additional context around the general work of CCEE and our initial statutory mandate of "advis[ing] and assist[ing]" LEAs with achieving the goals set forth in their LCAPs, which have been replaced by the Learning Continuity and Attendance Plans for the 2020-21 school year.

- Is there the possibility of a multi-year award (at least through the 2021-22 fiscal year) due to the timelines involved to develop resources/content? In addition, the timeframe necessary to onboard additional staff to support the project could impact project completion based on the project timeline (through June 2021).

    RESPONSE: The RFP is for work to be completed through June 2021, but includes the possibility that the project may continue. Annual extensions may be possible. CCEE is requesting proposals to complete the scope of work by June 30, 2021.

OWNERSHIP
- Will all databases, architecture, and/or profiles developed by the contractor become property of CCEE, or will the contractor retain any source rights on them?
- Will the system that is created be available for the awardee to use in other ways, or is it envisioned to be the sole property of CCEE?

    RESPONSE: All materials, both tangible and intangible, generated in the course of providing services to CCEE within the scope of this Agreement shall be the property of CCEE and shall be provided to CCEE upon full completion of services, termination of the contract with the CCEE, or as otherwise specified in the agreement with the CCEE.

PROPOSAL PARAMETERS/SPECIFICATIONS

- May an applicant submit a proposal for fewer than the four deliverables outlined in the RFP (database, data profiles, website, professional learning), focusing on just one or two of those deliverables and then partner with other contractors hired by CCEE?

  RESPONSE: Applicants may submit proposals including fewer than all four deliverables outlined in the RFP.

- Does the application need to specify the subcontractors or can subcontractors be identified after the contract has been awarded by CCEE?

  RESPONSE: It is preferable for Respondents to include all partnerships, including subcontractors, in their submission. Any subcontracting decisions made following the contract award outlined in the RFP will be subject to review/sign-off by CCEE.

- Is CCEE/MCOE open to having co-leads for this work?

  RESPONSE: The RFP is available to respondents who may elect to respond as part of a partnership or consortium of entities.

- Is there a minimum or maximum number of references to include with the proposal?

  RESPONSE: There is no minimum or maximum number of references to include with the proposal.

- As a national organization, we've been at work in this space for over 15 years. Can you explain what you mean by "California educational context" in Section V.B., Minimum Qualifications? Specifically, I want to know your criteria for non-compliance. For example, we have seen other situations actually require bidders to maintain their principal place of business in the state.

  RESPONSE: Respondents must have some level of familiarity working with, for, or developing resources/services to support LEAs within California. There is no requirement for respondents to maintain a principal place of business within California.

- Page 9 of the RFP states: "The work plan shall include time estimates for each significant segment of the work, the number of staff to be assigned, including supervisors where appropriate, the level of each of the staff members to be assigned, and any specialists or subcontractors who will be assigned." What are the expectations around the information provided in a response regarding the "level" of staff?

  RESPONSE: CCEE requests that all key personnel or staff/consultants contributing expertise to the project be identified in the workplan. Administrative staff, support staff, and those who are not materially contributing to the development of resources do not need to be individually identified.

RFP PROCESS

- Is it possible to schedule a call with CCEE staff overseeing this project on August 19 or 20 to discuss responses to questions in lieu of typed responses?

RESPONSE: All questions must be submitted to CCEE through the process as outlined in the RFP. CCEE staff will not hold individual calls or interviews with potential applicants prior to the RFP closing date.

- Will a proposal response scoring rubric be published in advance? If so, when can we expect that?

RESPONSE: A proposal scoring rubric will not be published in advance. CCEE will be scoring based on the Proposals' responsiveness to the scope of services outlined in the RFP, as well as the Proposal teams' capacity and experience to do the work in the timeframe identified. Because CCEE is not required to issue an RFP for these services, staff will evaluate each Proposal on an individualized basis. Proposal budgets will be taken into consideration, but CCEE is not required to accept a Proposal based on the estimated budget for the project.

- Can you share more about Marin County's role in the project? They are designated as the fiscal agent, but do they have any other role in the project?

RESPONSE: The Marin County Office of Education (MCOE) is the administrative agent for the CCEE. As such, MCOE will be issuing the contract and processing invoices on behalf of the CCEE. All programmatic activities will be overseen by CCEE staff.