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REQUEST FOR PROPOSALS FOR **DIGITIZATION OF THE STATE STANDARDIZED INDIVIDUALIZED** **EDUCATION PROGRAM (IEP) TEMPLATE**

ISSUED BY:

The California Collaborative for Educational Excellence (CCEE) and
the Marin County Office of Education (MCOE),
Administrative Agent for the CCEE

ISSUED ON:

September 19, 2025

PROPOSALS DUE:

October 15, 2025

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The California Collaborative for Educational Excellence (“CCEE”) and the Marin County Office of Education (“MCOE”), as the CCEE’s Administrative Agent, invite qualified organizations (“Respondents”) to submit proposals (“Proposals”) in response to this Request for Proposals (“RFP”). Proposals shall comply with the requirements set forth herein. The CCEE/MCOE is not required by law to use an RFP process, but has elected to do so for the particular services described herein in order to seek qualified parties who meet the unique service needs of the CCEE.

I. Timeline

Activity	Date
Release of Request for Proposals	September 19, 2025
Deadline for Submission of Questions	September 26, 2025 (4:00 PM PST)
Responses to Questions	October 3, 2025
Due Date for Proposals	October 15, 2025
Work to begin no earlier than:	October 31, 2025
Duration of Services	Through June 30, 2026
<i>Note: All dates are preliminary and subject to change.</i>	

II. Purpose

CCEE is seeking proposals from a California special education student information system vendor for the digitization of the standardized individualized education program (IEP) template, as set forth in Section 76 of Assembly Bill 121 (Chapter 8, Statutes of 2025).

III. Background and Legislative Goals

CCEE was created to “advise and assist” LEAs with achieving the goals set forth in their Local Control and Accountability Plans (“LCAPs”). (Ed. Code § 52074.) In coordination with California’s Statewide System of Support, and in alignment with its [Theory of Action](#), CCEE helps to build the capacity of LEAs to support the continuous improvement of pupil performance, address the achievement gaps between pupil subgroups, and improve outreach and collaboration with stakeholders to ensure that LCAPs reflect the needs of pupils and the community, especially for historically underrepresented or low-achieving populations. (Ed. Code § 52059.)

For more information about CCEE’s work and its initiatives, please visit the CCEE website at [Homepage - CCEE \(ccee-ca.org\)](http://ccee-ca.org).

As defined in [AB 121 §76](#), the California Collaborative for Educational Excellence shall, in consultation with the executive director of the State Board of Education, enter into a contract with a California special education student information system vendor. The vendor shall do all of the following:

- (1) In consultation with the [high-quality individualized education program special education resource lead](#) selected pursuant to Section 52073.2 of the Education Code, convert the state

standardized individualized education program template into a user-dynamic software platform that provides all of the special education data management features and functionality currently available to local educational agencies, including, but not limited to, all of the following:

- (A) Drafting individualized education programs.
 - (B) Managing special education data.
 - (C) Tracking special education service delivery.
 - (D) Running reports.
 - (E) Integrating with other data systems.
- (2) Develop an interactive digital version of the state standardized individualized education program template that is accessible to the public at no cost.
- (3) Make the digitized templates described in paragraphs (1) and (2) above available to local educational agencies and to the public, respectively, on or before June 30, 2026.

IV. Scope of Services

CCEE is seeking proposals for the digitization of the state-standardized individualized education program template as outlined in this section.

Respondents must describe their approach for:

- Converting the state-standardized IEP template into a dynamic, user-driven software platform that includes all data management features currently available to LEAs
- Developing an interactive, digital version of the state-standardized IEP template for public viewing and making available through June 30, 2028
- Proactively identifying potential user experience challenges, with recommendations for continuous improvement.
- Integrating translated versions of the [state-standardized IEP template](#), once developed by the California Department of Education pursuant to [California Education Code Section 56348](#), into the platform.
- Maintaining a digitized template available to users at least through June 30, 2028.
- Enabling configuration at the SELPA and/or the LEA level, allowing optional IEP fields to be activated or deactivated based on local discretion.
- Participating in regular meetings (virtual and in person meetings) with assigned Resource Lead and CCEE staff to provide project status updates and address implementation issues.
- Create a timeline of required activities by June 30, 2026,

Respondents must describe their expertise in and ability to:

- Keep current on state changes to CALPADS reporting and maintain flexibility to implement adjustments to the template during the digitization process to ensure LEA compliance.

- Proactively identify potential user experience challenges and solicit/respond to recommendations for continuous improvement.
- Enable configuration at the SELPA and/or LEA level, allowing optional IEP fields to be activated or deactivated based on local discretion.
- Collaborate effectively with identified educational partners
- Create a test environment and execute testing of the digitized version of the state-standardized IEP template.

The selected Respondent will be expected to work closely with and under the supervision of assigned CCEE project staff and assigned staff from the high-quality individualized education program special education resource lead that was selected pursuant to 52073.2 of the Education Code to complete each of the activities outlined above.

V. General Proposal Information

A. Respondents' Eligibility

Sole proprietorships, partnerships, and public or private agencies may submit proposals in response to this RFP. The Respondent must be legally constituted and qualified to do business within the State of California.

The Respondent responding to this RFP must serve as the Prime Contractor and will be the responsible entity for ensuring that all tasks and activities are successfully completed.

B. Minimum Qualifications for Respondents

Respondents must be a current California special education student information vendor with a minimum of five years of experience in IEP form digitization and reporting special education data to the California Department of Education.

Please see Section VI.E., Qualifications of Respondent Personnel, for additional information pertaining to personnel requirements.

C. Questions and Clarifications

Respondents may submit questions and requests for clarifications or additional information regarding this RFP, in writing only, to Melissa Hodgson (the "CCEE Contact") at mhodgson@ccee-ca.org.

Questions and requests for clarifications may be submitted at any time up to September 26, 2025 at 4:00 PM (Pacific Standard Time).

CCEE will endeavor to provide responses and clarifications via CCEE's website at ccee-ca.org by October 3, 2025. At its discretion, the CCEE may respond to questions that are submitted late or not in proper form. The CCEE reserves the right to rephrase or not answer any question or inquiry submitted, regardless of timing or form of the question. Respondents are solely responsible for monitoring any questions or answers posted on the CCEE's website and incorporating any answer or information provided by CCEE into their Proposals. Respondents shall not contact any other CCEE or MCOE employee or agent regarding this RFP except for the CCEE Contact identified above.

VI. Proposal Specifications/Requirements for Submittal

Each Respondent must submit a Proposal that contains all the required items listed in this section. Any Proposal that does not include all required items may be disqualified from consideration, but the CCEE reserves the right to consider Proposals that do not meet all the requirements, at its sole discretion. Proposals should not be any longer than 15 pages, excluding curricula vitae of identified personnel. Proposals can utilize tables and/or bullets to clearly communicate main ideas and the flow of work.

A. Cover Letter (2 page maximum)

B. Scope of Project

The Proposal must include a section that addresses all points outlined in Section IV (Scope of Services) of the RFP.

C. Description of Respondent Organization (1 page maximum)

Include the name and contact information for your organization (address, telephone number, fax number), as well as the name and contact information (telephone number and email address) of the principal contact for your application. Provide a brief history of the organization, including:

- Number of years in business/practice
- Senior member(s) and length of association
- Whether the organization may have been known by a different name while under substantially the same management
- Location of the office where the project team members will design and oversee the evaluation program
- List of basic services generally provided by the organization

D. Organizational Capacity and Previous Experience (2 page maximum)

Proposals must describe and demonstrate the Respondent's capacity and ability to perform and administer all activities related to the activities they are proposing in the Scope of Services. This includes a demonstration of the Respondent's experience in developing and delivering the areas of focus identified in the Scope of Services. The Proposal must establish that the Respondent meets the eligibility requirements set forth under Section V.A., Respondents' Eligibility.

Proposals must also reflect the Respondent's understanding of California education policies, especially those associated with the Local Control Funding Formula ("LCFF"), the California School Dashboard, the Statewide System of Support, as well as broader education policy and research as it relates to the support outlined in this RFP.

If the Respondent will be subcontracting a portion of the work, the Proposal must describe and demonstrate the subcontractor's capacity and ability to perform the portion of the work in which the subcontractor will be involved. The Proposal must establish that all proposed subcontractors meet the eligibility requirements set forth under Section V.A., Respondents' Eligibility.

E. Qualifications of Respondent Personnel (2 pages maximum, including Organization Chart)

Please include the name of all individuals proposed by the organization to perform the duties described above in Section IV, Scope of Services, including the qualifications of each and what

each would be doing. Current résumés for each individual must be included as attachments to the submitted Proposal and will be counted in the page limits.

E.1. Project Lead

Proposals must identify a dedicated Project Lead by name and include descriptions of how the proposed Project Lead meets the qualifications described herein. The Proposal must describe how the Project Lead will effectively coordinate, manage, and monitor the efforts of assigned staff, including subcontractors and/or consultants, to ensure that all tasks, activities, and functions are completed in an effective and timely manner.

The Project Lead will serve as the primary contact for the CCEE and will be expected to provide regular updates and ongoing communication with identified CCEE staff.

E.2. Changes to Key Personnel

Once a Respondent is selected, the assigned project personnel, including the Project Lead, cannot be changed or substituted without the CCEE's prior written approval. Any substitute personnel shall meet or exceed the qualifications and experience level of the previously assigned project staff/personnel.

E.3. Subcontracts

A subcontract is defined as any and all agreements between a Respondent and another entity, individual, or business, for the accomplishment of any task, or component of a task, in whole or part, described in this RFP. All work assigned to subcontractors remains the responsibility of the selected Respondent. For each proposed subcontractor, the Respondent must include:

- a) Description of the activities and functions that will be performed by the subcontractor/consultant;
- b) Brief explanation as to why the subcontractor was selected; and
- c) Curricula vitae for each consultant or personnel of a subcontractor who will be assigned to the project.

E.4. Organization Chart

An organization chart, including organizational titles, project roles, and names, should be included with the Proposal.

F. Conflict of Interest

Please disclose any past or current business or other relationship(s) with the CCEE, CCEE Governing Board members, CCEE employees, or MCOE.

G. Costs and Fees (1 page maximum)

Provide an annual detailed breakdown of the proposed fees and costs for the activities described in the Proposal, not to exceed \$700,000. The total annual fees and costs must be stated as a "not to exceed" amount. Describe the Respondent's willingness to commit to the estimate provided, and what factors may influence the estimate in the event of technical and programmatic changes.

Regardless of the method of delivery and content area (see Section IV), please include:

- Cost to complete the proposed deliverables

- Fee structure (e.g., hourly rate, fixed rate deliverable, or a combination of hourly rate within a fixed rate, not to exceed deliverable)
- Any additional relevant fees/costs

Due to the year-to-year nature of the CCEE's funding, while Proposals may include multi-year project proposals, any contract with the selected Respondent(s) will need to be written such that it is for a single 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 Proposal based on cost estimates.

H. References (Half page maximum)

Provide a list of clients (including name, address, email address, and telephone number of contact person, as well as a bullet description of the work performed) for whom Respondent has performed similar services.

I. Submission Review Rubric

All Proposals will be evaluated using the following criteria with a total available point value of 60 points (5 points per bullet):

RUBRIC		
Proposal Quality	Project Experience/ Organizational Approach	Team Strength
<ul style="list-style-type: none"> • Proposal addresses all required components in the RFP, is within the specified page limit, and does not exceed specified budget limit • Proposal narrative includes specificity in deliverables and action steps • Proposal is reasonable and understandable given the timeframe for deliverables • Budget is clear and aligned to deliverables 	<ul style="list-style-type: none"> • Demonstrated expertise conducting projects similar to size, scope and focus of the project outlined in the RFP • Demonstrates capacity to deliver timeline of activities by June 30, 2026 • Demonstrates the ability to adapt to current/changing situations as they arise • Demonstrates the ability to respond to feedback 	<ul style="list-style-type: none"> • Demonstrates project management experience • Describes how the Project Lead will effectively coordinate, manage, and monitor the efforts of assigned staff, including subcontractors • Describes how their organization plans to work collaboratively with CCEE and partners • Demonstrates expertise in appropriate delivery method(s) and content area(s) outlined in the submission

The CCEE reserves the right to assign weight to each of the criteria and to consider additional or different factors in its evaluation of the Proposals.

VII. Rights of the CCEE/MCOE

This RFP does not commit the CCEE/MCOE to award a contract or pay any costs incurred in the preparation of a response to this RFP. CCEE/MCOE, at its sole discretion, may reject all Proposals and/or enter into direct negotiations with a Respondent or other party and enter into an agreement for all or part of the services set forth herein outside of the RFP process. The CCEE/MCOE is not required by law to use an RFP process but has elected to do so for the particular services described herein in order to seek qualified parties who meet the CCEE's unique service needs. The CCEE/MCOE reserves the right to accept all or part of any Proposal or to cancel in part or in its entirety the RFP. The CCEE/MCOE further reserves the right to select the Respondent(s) that it considers to be in the best interests of the CCEE.

VIII. Submission Details

- A.** As noted above, the CCEE/MCOE will begin accepting Proposals upon the date of issuance of this RFP, and will continue to accept Proposals until October 15, 2025 at 4:00 PM (Pacific Standard Time).
- B.** Respondents must submit an electronic signed copy of the original Proposal (as a PDF) via email to Melissa Hodgson at mhodgson@ccee-ca.org with the subject line: "[IEP TEMPLATE RFP SUBMISSION]." Hard copy Proposals may not be accepted.
- C.** Respondent shall be solely responsible for ensuring its Proposal arrives to the CCEE by the deadline set forth above in order to be eligible for CCEE's initial selection process. The CCEE/MCOE shall not be responsible for any technical issues with email delivery.
- D.** All Proposals should be verified before submission. Adjustments may not be permitted after submission to the CCEE. The CCEE/MCOE will not be held responsible for any Respondent errors or omissions in the preparation of their Proposal.
- E.** Any costs incurred by the Respondents in the preparation of any information or material submitted in response to this RFP shall be the Respondent's sole responsibility.
- F.** The CCEE/MCOE reserves the right to reject any and/or all Proposals, or to refuse to negotiate or withhold the award of any contract, for any or no reason. The CCEE/MCOE may also waive or decline to waive irregularities in any Proposal. The CCEE/MCOE further reserves the right to select the Proposal(s) that it considers to be in the best interests of the CCEE.
- G.** The CCEE/MCOE may begin negotiations with selected Respondents at the CCEE's discretion.
- H.** Upon selection of a Respondent, the CCEE/MCOE shall provide an agreement for negotiation by the Parties.
- I.** All proposals submitted in response to the RFP become the property of the CCEE and a public record and, as such, are subject to public disclosure.

IX. Receipt of Proposals; Contact Information

Respondents are not to contact the Marin County Office of Education, including Board members, the Superintendent or any other employee or representative of the MCOE or the California

Collaborative for Educational Excellence, including Board members, the Executive Director, or any other employee or representative of the CCEE, apart from the CCEE Contact identified herein, regarding this RFP. Contacting such officials, employees and/or representatives, other than the CCEE Contact identified herein, may result in the Respondent's disqualification. CCEE and MCOE shall not be bound by any statement made by any CCEE/MCOE employee or agent regarding this RFP and/or the work set forth herein, except for the responses provided by the CCEE Contact as set forth herein.

All inquiries or questions for additional information should be directed in writing to Melissa Hodgson at mhodgson@ccee-ca.org by September 26, 2025 at 4:00 PM (Pacific Standard Time). CCEE will make every effort to respond, but any failure or delay in responding shall not excuse a Respondent's failure to comply with any requirements for submission set forth herein, including the submission deadline.

In order to be considered in the initial evaluation of timely Proposals, Respondents must submit an electronic signed copy of the original Proposal (as a PDF) via email to Melissa Hodgson at mhodgson@ccee-ca.org by October 15, 2025 at 4:00 PM (Pacific Standard Time) with the subject line: "IEP TEMPLATE RFP SUBMISSION."