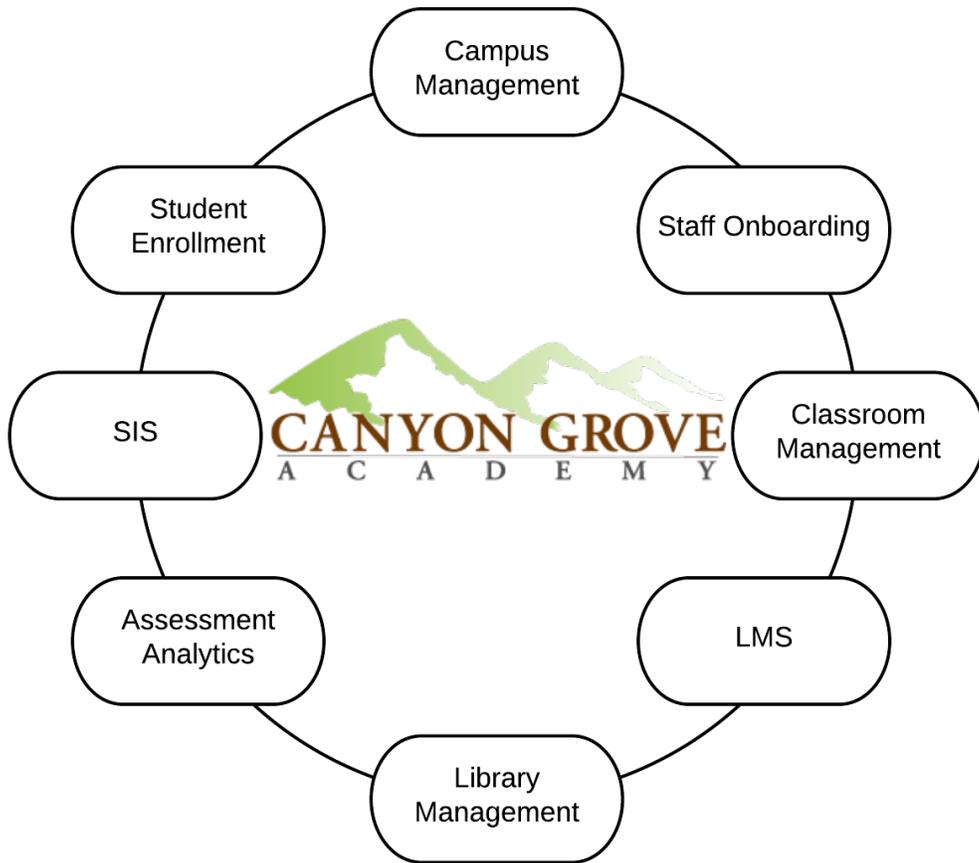


Custom Application Request for Proposal

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General Overview

Solicitation Information

Contact Information

Canyon Grove Academy
Joshua Daniels, Board President
josh@canyongrove.com

Opening and Closing Dates of solicitation

Solicitation Start Date: November 21st, 2020
Solicitation End Date: Dec 31st, 2020
Determination Date: January 22nd, 2021

Submission Information

All proposals will be submitted to Joshua Daniels via email at josh@canyongrove.com

Obtaining Information and Copy of Documents

To obtain more information or contesting of the solicitation, contact Joshua Daniels at josh@canyongrove.com.

General Description and Scope of Project

Top Step Technology completed a process discovery in order to gain greater insight into Canyon Grove Academy operations. Based on previous experience in the same industry, Top Step was able to infer many parallels between CGA and other schools. After several conference calls, and reviewing approximately 40 documents provided by CGA, Top Step confirmed the inferences and has determined that an application should include the following high level features;

1. School and Campus Management
2. Staff Management
3. Student Enrollment and Parent Onboarding
4. Classroom Management
5. Assessment and Progress Reporting
6. Attendance and Student Interaction Monitoring
7. Library Management
8. Learning Management System (LMS)

Business Case for Project

The application will optimize the business workflow and support key process improvements. The application will act as a single source of information. Although this is being built with CGA's current practices in mind, careful consideration and design elements should be added to allow for easy expansion and improvements down the line.

In regards to administrative tasks, the application should improve hand-offs, improve collaboration, reduce redundant data entry, reduce rework, and provide leadership with the visibility to their business. On the educational front, the application should allow for better communication between students, parents and teachers. It should provide a single source of information with easy to use mobile and desktop experiences.

Supporting Information

Abbreviations and Acronyms

CGA - Canyon Grove Academy

ES - Education Specialist - A Staff Manager that oversees multiple classes and works directly with parents in regards to student learning outcomes.

API - Application Program Interface - Language computers use to transfer data.

SIS - Student Information System - System to store contact, family, emergency, and enrollment information.

LMS - Learning Management System - Platforms used to deliver online learning.

FERPA - Family Educational Rights and Privacy Act - Used to protect the confidentiality of students and families.

DIBELS, RISE, Acadience, etc - Assessment tools used to test student learning.

Lexia, ST Math, Reading Horizons - Online Learning platforms for subject specific learning.

Google Classroom, NWEA, Canvas, Empower, OTUS - LMS platforms for delivering online content to students.

User Classes and Characteristics

Administrators (Admin): Campus and system administrators. Directors, Principals, Office Admin, etc.

Manager: Staff member that may need to see and assist multiple classrooms. ES, Interventionist, etc.

Staff Member (Staff): Focus on the classroom functions and parent/student interactions.

Parent/Guardian (Parent): Adults that may have multiple Students.

Student: The most basic users, with the need for the most basic and user friendly experience.

Integration vs Custom

There are numerous 3rd-party systems and applications that are designed to aid educators. Many of these systems have been around for a while, and the integration options (Open APIs) are limited or non-existent. After careful review, it is recommended that rather than integrating with most systems, the functionality is replicated in a custom application. However, it is up to the developer to weigh the pros and cons and present that reasoning in the proposal.

For example, one of the modules listed below is a resource/library management system. *Alexandria* is the library and asset management system currently being used at CGA. It was originally designed for public libraries. It has extensive features and functionality, however many of the features are overkill and unnecessary for CGA. It also does not have an easily accessible API. With it being a standalone system, it adds extra steps and overhead to manage.

RFI Procedure

All requests for information should be directed to the following;

Kim Goates: kim.goates@canyongrove.com

Matthew Neil: matthew@topstep.tech

System Requirements

User Stories Example

To help explain the functional requirements and needs of CGA, some of the following requirements will be presented in what are called "User Stories". These are sentences that help illustrate the person using the system, and the task or goal of that person.

Typically the user story is written in the following format;

"As a <type of user>, I want to <perform some task>, so that I can <achieve some goal>".

A simple example would be: As a Teacher, I want to have my class list, so that I can take attendance.

The following business objectives, requirements and user stories classify the needs to build a new software system to manage Canyon Grove Academy. If possible, please itemize the large modules in your proposal.

Module #: The Example

Business Objectives

The Objectives Written Out

Requirements

- Bulleted list of requirements

User Stories

- As a <type of user>, I want to <perform some task>, so that I can <achieve some goal>

Additional Considerations, Connections or Comments

Additional information to provide extra context and/or guidelines.

Module #1: School Management

Business Objectives

At a high level the school has documents related to campus policies and procedure. The school also has a need for general organization and reporting. The idea behind creating a school level to the application will allow for future scalability if and when the organization grows.

Requirements

High level information regarding the school, logo, address, contact information, website, and document storage.

User Stories

As an Admin, I want to centralize our business documents, so that all staff can easily search and find the needed information.

Additional Considerations, Connections or Comments

For context, the possibility of scaling the software has been discussed. Thus, a scalable and adjustable software is required. Also, the term 'School' is in reference to the organization or a Local Education Agency (LEA) such as a school district. Each school could have many different Campus Locations at different grade levels.

Module #2: Campus Management

Business Objectives

Each campus is often managed independently of the LEA, and has its own documents, policies and procedures. It also has its own management and staff. Although the structure is consistent within the LEA, the Campus will need to independently operate with Administration, Staff and Students. Ability to assign and see staff roles will provide all staff the needed organizational chart. Ad-hoc or templated tasks can happen on given intervals or as needed. Scheduling or coordination of events and resources is needed.

Requirements

- A school may have many campus locations. Key contact information will be needed for each location.
- Location specific documents, policies, safety information, etc.
- A Trello like experience (Kanban) for easily creating tasks, sub-tasks, and assignments. These could be general items or student specific tasks.
- Schedule and event calendar for all campus events, fields trips, discovery days, etc.
- Location to store campus policies and handbooks. Accessible by the tagged groups (Admin, Staff, Teacher, Parents and/or students).

User Stories

- As Admin, I want to see all staff and students enrolled at our campus, so that I can pull reports and lists for emails or other administrative tasks.
- As Admin, I want to have a centralized location for document storage, so that Staff and Students can easily access the information needed.
- As an Admin or Staff, I want to create checklists or tasks with assignments and due dates, so that I can meet deadlines and stay organized.
- As a Campus Admin, I want to be able to create and manage a campus schedule for important events and publish this information, so that staff and students are informed.
- As a Parent, I want to easily find campus resources and schedule, so I can make appropriate student and family plans.

Additional Considerations, Connections or Comments

In later modules, the 'campus' will be a defining factor for access, reporting, and scheduling.

Module #3: Employee Management

Business Objectives

Just like any business, the staff are the lifeblood of the business. As an employer, standard onboarding processes, paperwork and training are required. We want to create a centralized location for our onboarding process where we can verify that (1) the applicants meet our standards and (2) if hired they are properly integrated into our School / Campus. This can include simple things like contact information, to the more complex items like employment terms, roles, responsibilities, and tax documents.

Requirements

- Employee profile information.
- Notes, Documents, and onboarding tasks that may vary by role.
- Access and permissions levels should allow for different roles to view, add or update information throughout the application.
- The exact permissions matrix is not known at this time, these permission models should be flexible and be easily adjustable.

User Stories

- As an Admin, I want to have an onboarding process, so that I can easily keep track of outstanding items for new staff.
- As an Admin, I want to classify employees in different roles, so that I can easily filter and search when needed.
- As Staff, I want to be able to update my contact information, so that I can stay connected at all times.
- As Staff, I want to only see what is designed for me, so that I can have an easy interface to accomplish my goals and job functions.

Additional Considerations, Connections or Comments

Although this module is designed to keep track of the process, it will not be a substitute for our normal HR practices and contracts. However, we do wish to have that information (contracts, HR docs, etc.) contained within for easy record access.

Module #4 - A: SIS - Student Information System

Business Objectives

Managing Student and Parent information across multiple tools, lists and operations creates duplicate and inconsistent information. i.e. Adding a new student to 10+ systems takes considerable time, and when contact information changes, it also requires a lot of updates. As we grow, this problem becomes even more complicated. People's contact information and family relationships are constantly changing. Oftentimes families miss important information because of out-dated contact information. Additionally the State requires that we keep detailed records of grades, tests and achievements. This all needs to be tied to the Student's State ID. Part of the State SIS also includes things like enrollment and daily attendance (which will be explored in another module). Currently CGA uses a system called "Aspire" as their SIS.

Requirements

- Student and Parent Profiles
- Contact information, notification preferences, profile photos.
- Parents may have more than one Student.
- Parent visibility to all family members and their course work.
- Dashboard with progress towards standards and assessment results.
- Enrollment reports by school, campus, grade, teacher, etc.

User Stories

- As an admin/teacher, I want to see students grouped by family units, so that I can optimize my communication with those students/families.
- As a parent, I want to easily update my family information and notification preferences, so that I can stay up to date.
- As Admin, I want to see and update student enrollment information, so that our rolls are accurate and up to date.

Additional Considerations, Connections or Comments

An integration with the State UTREx system will be required and detailed in a Module below.

Module #4 - B: SIS - Student Onboarding

Business Objectives

Accepting applications and onboarding new students/families can be a very long and laborious process. Oftentimes we are using 2-3 systems to accommodate it. There are a set of documents that need to be signed, reviewed and approved before the student can begin classes. The process is somewhat reversed when a student withdraws or transfers to another school/campus.

It is our goal to standardize the onboarding process as much as possible, and allow the system to auto complete various communications based on events, like welcome emails, invitations to subscription services, schedule confirmations, etc.

Requirements

- Automatic task lists for new students.
- Automatic task list for departing students.
- Profile options to update contact information, upload profile photo, etc.
- Policy acceptance documents
- Photo restrictions or consent
- Identify the 'Release To' (with photo) and "Do Not Release To" individuals for safety.
- Student attributes such as allergies, disabilities, medical diagnosis, prescriptions, etc.
- Links to Sign Ups for field trips, or special events.
- Configurable email notifications that can contain system information and send on given triggers.

User Stories

- As a school admin, I want an onboarding/offboarding checklist for new students, so that I can ensure we have everything needed.
- As a school admin, I want an onboarding checklist for new families, so that I can ensure they are well informed and have access to the tools needed.
- As Admin, I want the system to automatically send emails when a user clicks a button, so that I can standardize the communication to families.
- As a Parent, I want to provide carpool information, so that the campus Staff knows who is allowed to pick up my Student.
- As a Teacher/Admin, I want to know which Students have consented to photography, so that I can use images on promotional or social media materials.

Additional Considerations, Connections or Comments

At this point the students and parents will be brand new to the system, and will need an easy dashboard and process to follow. Special considerations should be made to not only provide a smooth campus onboarding, but system onboarding as well.

Module #4 - C: SIS - Classroom Management & Attendance

Business Objectives

One of the main complexities is managing our classroom assignments. This includes which Teachers, Aids and Students belong to each class. These assignments change often, especially with CGA. The classes typically only meet on Campus one day a week (Epic Day) for traditional class, with another weekly 'Discovery Day' out in the community. The remainder of the time is spent at home (distance) learning. We strive to provide our parents with the flexibility needed.

However, with State funding being tied to program attendance, it is important that we not only keep track of physical attendance, but also passive attendance and usage. For example, on a 'distance learning day', if the student uses one of our online tools for whatever reason, we assume that is for learning purposes. This is counted towards a day in attendance. Throughout the week there are many touch points and contacts made with the Student/Family and as long as CGA is providing support for learning, we need to track that day as attended. If however, no contact or no usage has been made in

10 days, the Student is marked absent daily until they have re-engaged. This process is very labor intensive and prone to errors.

Requirements

- Class Rolls and Attendance option for in-person classes/Epic Days.
- Teachers and Students should be easily assigned to classes.
- When a student withdraws or transfers locations, class rolls should be easily updated with start and end dates.
- For distance education students, as many 'passive' touch points for daily tracking as possible. I.e. System usage, submitting assignments, requesting resources, using subscriptions services (Lexia, ST Math), etc.
- Track communication and touch points with students/parents with the notes and follow-up actions if needed.
- Reporting for attendance by campus, class and/or teacher.
- Easily create lists of class member (and Parent) information.
- Bonus: Text messaging capabilities.

User Stories

- As a Teacher, I want to quickly take attendance, so I can focus on education.
- As an Admin, I want to know when students are absent, so that I can follow-up with the parents.
- As a Parent, I want to be notified if my student is absent when physical attendance is expected, so that I can take appropriate actions if needed.
- As an Admin/Staff, I want to know which haven't had contact in the last 7 days, so I can be sure to contact and make sure they have everything they need.

Additional Considerations, Connections or Comments

Options for improving passive contacts could include email or text campaigns designed to prompt or remind the students of assignments or lack of usage. Some thoughts around gamification for this were discussed, but not a requirement. I.e. daily rewards for work, or on time completion bonus points, etc. This module has potential for outside integration points to automate the usage reporting.

Module #4 - D: SIS - UTREx Integration

Business Objectives

Due to state regulations, if we wish to use the custom application as an SIS, it must (1) integrate with the state UTREx data collection system and (2) be approved by the Utah Board of Education. This integration would significantly reduce the amount of double entry and errors.

Requirements

- More information and integration requirements can be found on the Utah State Board of Education website here:
<https://www.schools.utah.gov/informationtechnology/utrex?mid=1953&tid=0>

Additional Considerations, Connections or Comments

The approval process for a new SIS Integration has various deadlines for approvals in a given year. Be aware that may affect the timeline and development sequence.

Module #4 - E: SIS - Student Finance Management

Business Objectives

Providing quality teachers, curriculum, and learning experiences can be costly. As part of managing a school there are some high level finances related to students that need to be tracked. We want this module to only track expenses that are directly related to a single student. External expenses like general operating expenses will not be included. Examples of student finances can include replacement cost for damaged curriculum, or resources (such as books or laptops), field trips, and special events. As expenses are incurred, we need to tally them, and also track the payments against those expenses. Usually at the end of year (or during a withdrawal), we need to zero out the account and collect any overdue charges. When a student account is delinquent, follow-up notes and tracking for contact attempts needs to be documented.

This module does not need to process payments, but rather allow for logging of those payments and the payment method (cash, check, card, etc.). We are open to proposals of payment processing integrations, but it is not required.

A bonus feature would reconcile the number of student days in attendance (an expense) against the state funding (WPU payments). As noted earlier, the total number of days a student participates in the program, affects our funding. Reporting to know these numbers would help us (1) compare student attendance to assessments and (2) ensure we have adequate funding.

Requirements

- Connection with the Library module to allow for cost of replacement based on asset values.
- Student Invoices to charge expenses to individual students.
- Payment tracking for when an invoice is paid.
- Student account balance reporting for follow-up and visibility.

User Stories

- As a Parent, I want to know what expenses my student has incurred, so that I can pay in a timely manner.
- As an Admin, I want to know which students have an outstanding balance, so that I can follow-up and collect payment.
- As an Admin, I want to reconcile resource library rentals with damages, so that we can recoup cost of lost or damaged items.

Additional Considerations, Connections or Comments

This is not designed to replace our accounting system, but rather enable easy tracking and visibility to all parties involved.

Module #5: Campus, Class & Student Schedules

Business Objectives

Coordination and communication are very important among Admin, Teachers, Students and Parents. One of the main points of inquiry that we receive from Parents is *When/Where/What* information. Providing a clear and concise schedule should reduce the number of phone calls or missed events. Despite having the necessary information on the website, it was disjointed and

confusing to the Parents. The tricky part is sometimes events are Campus wide, and other times its a single teacher/student/parent meeting.

We need a scheduling system that allows for a centralized, or at a minimum connected, schedule for all calendar events. Some examples of events are class days, tutor sessions, intervention planning, or parent teacher conferences. Additionally we need to indicate class days or non-class days.

Requirements

- Campus, Class and Student Schedule
- Ability to have a centralized calendar of all campus events and ability to add entire classes to the event.
- Calendar of campus events, staff and student specific events (eg. parent teacher conferences).
- Visibility to students and parents of campus calendar and class schedules.
- Ability to assign multiple classes to a campus event, or multiple students.
- Easily add recurring events similar to most calendar systems.

User Stories

- As an Admin, I want to easily add and update the Campus schedule, so that everybody is aware of events and event details.
- As a Teacher, I want to be able to schedule events with Students/Parents, so that I can stay organized.
- As a Parent, I want to see my Student's schedule so I'm aware of all events and details.

Additional Considerations, Connections or Comments

Some of these events can be considered a touch point, or a day of attendance, and should reflect on the attendance tracking module. A 'nice to have' would allow various calendars to be 'subscribable', to allow parents to sync with their personal calendars. Additionally an option to send 'reminders' prior to special events on a schedule as defined by the Staff/Admin.

Module #6: Learning Management System (LMS)

Business Objectives

LMS' are popular in the business world to aid in HR related onboarding or provide training. With the more recent need for remote work and remote education the need for an LMS has become even more critical. In the education world, some LMS examples include; Empower, Canvas, and Google Classroom. All of these have been evaluated and/or used, and have acted as our guide for requirements. They have various features for content management, learning paths and student submissions. The proposal can either (A) include the option to replace and build a custom LMS, or (B) integrate with an existing LMS that meets the requirements. If integrated, please include any recurring cost of that 3-party system and/or integration. Regardless of the option proposed, it must (1) accomplish the requirements, (2) be easy for staff to manage the lessons and content and (3) be engaging for the students and parents.

Requirements

- Create and manage lessons, assignments and assessments.
- Create course plans that encompass many different lessons and can be customized to the needs of the student.

- Create and manage learning standards.
- Ability to tag certain assignments with given standards.
- Alternative or supplemental lessons to provide options for students with different learning methodologies.
- Track progress on lesson completion and competency.
- Ability for students to submit/upload completed work.
- Usage information to allow for passive contact tracing.

User Stories

- As a Student, I want an easy way to submit work pages, so that I can get credit for the work.
- As a Parent, I want to see what work pages are required, so that I can help my student complete work on time.
- As a Teacher, I want to be able to post work pages, so my students can know what we are working on.
- As a Teacher, I want to easily see and review submitted work, so that I can grade and provide feedback.
- As a teacher, I want to provide timely feedback on submitted assignments, so that my students can improve.

Additional Considerations, Connections or Comments

Considerations

Module #7: Resource & Library Management

Business Objectives

As part of CGA's service to provide distance learning opportunities, they also provide the resources and curriculum needed. These materials are costly and require detailed tracking. As resources are lent out to students/families, we need a smooth process to share the catalog, receive, approve and fulfill requests, track usage, and returns. There are some occasions where we do not have the curriculum needed (either out of stock, or not listed), and we need to have a process to track new material requests even when it is not an in-stock inventory item. There is constantly new and better materials available, and we want to make sure we are continually providing the best options to our students. As referenced above *Alexandria* is considered one of the best options for this module available and many of the feature requests below come from functionality within Alexandria. However, there is a cost and a disconnect between systems when using another platform. It is our hope to make this disconnect either non-consequential (by building our own solution) or as seamless as possible with an integration.

Requirements

- Barcode enabled Catalog of asset inventory (books, science kits, electronics, etc.)
- Ability to embed or share this live catalog list on a website.
- Ability to lookup an item by scanning a barcode.
- Tagging feature to associate a specific asset to a topic or curriculum.
- View curriculum and currently checked out materials to given students and families, and for how long.

- Home based curriculum information and logs. Know which students are using which curriculum for any given topic.
- Asset categorization and grouping to identify duplicate asset types or overlapping asset rentals.
- Ability to add notes and update the condition of materials during checkout and return.
- Optional Due dates on materials
- Some material kits have consumables, these consumables need to be replenished before the asset can be rented again.
- Order Requests need to be reviewed and approved prior to fulfilling the order.
 - Be able to see existing items, and avoid duplicate requests or fulfillment.
- A 'pick list' of all approved orders that need to be gathered for distribution.
- Have a waitlist option for popular or limited items.
 - When a waitlist item becomes available, the next person in line should be alerted of its availability.
 - Teachers and Staff should be able to reserve or check out items on behalf of the student for specific needs.
- Reporting on usage, inventory, and damages for maintenance of asset availability.
- Notifications of past due items, and periodic reminders of items that are checked out.
- Ability to Archive or Retire assets when they are no longer usable.
- Access/links to other learning resources / platforms / subscriptions.
- Usage statistics to know how often students use any of the subscription services such as Lexia or ST Math.

User Stories

- As a parent/student, I want to see the catalog of offerings, so that I can evaluate my options for materials.
- As an Admin, I want to easily catalog, sort, and group our resource library, so I can be organized.
- As an Admin, I want to be able to review and approve material requests, so that I can ensure the right material gets to the right student.
- As an Admin, I want to view a 'pick list' report for materials, so that I can easily fulfil material requests when the student or parent comes to campus.
- As an Admin, I want to be able to look up a book by scanning a barcode, so that I can quickly process rentals and returns.

Additional Considerations, Connections or Comments

Refer to the "Custom vs Integration" information to evaluate and bid this module.

Module #8: Assessment Tracking and Reporting

Business Objectives

As Educators, testing and assessing progress is key. We have various tests and assessments that are administered periodically throughout the school year. However, they all have slightly different scoring and separate reporting sources. It is a painstaking process to interpret, compare and review these assessments. Now more than ever with more distance learning, we need to ensure our students are learning and growing. We need a simple way to see tests across mediums and over time, even if a student transfers campuses. Ideally we can then compare assessment results to the usage of other

tools, and lesson proficiency. By identifying the best options for students we can improve the learning experience for the students and parents.

After gathering and normalizing the results, we need to present this information to the Students and Parents in a concise and informative manner. There is also a need to evaluate results across teachers, and campuses to help make managerial and curriculum decisions.

Because the data sources can vary, this normalization of data needs to be flexible and adjustable as new assessment tools are added.

Requirements

- Ability to compare state/district assessment results.
- See progress across various data points, such as; DIBELS, NWEA, RISE, SAGE, KEEP, etc.
- Ability to view progress of individual students, classes, grades or campuses.
- User friendly interpretation of results for parents and students to understand.
- See entire history of students across locations, years, and teachers.
- Automatically allow subscriptions to weekly, monthly reports.

User Stories

- As an Admin, I want to easily consolidate and analyse the assessment results, so that I can report on our program successes or failures.
- As a Teacher, I want to see my student's assessment results, so that I can focus my teaching on areas to improve.
- As a Parent, I want to see my student's assessment results, so that I can support my student in areas to improve.
- As a Student, I want to see my assessment results, so that I can see progress.

Additional Considerations, Connections or Comments

None at this time.

Module #9: SEP, IEP and Intervention Plans

Business Objectives

CGA strives to provide the best possible education at the individual level. As such, each student is independently evaluated and an IEP is written by the Education Specialist (ES). These IEPs need to be documented and continually updated to reflect the student's needs. When additional focus is needed, a subject specific Intervention plan is written and follow-up actions are planned. We need to add these IEPs and Interventions regularly and continually track the progress against the goals.

Some IEPs and Intervention plans are very similar in regards to focus areas and general desired outcomes. As such, being able to copy to another student, then make needed adjustments would be ideal.

These plans also correlate strongly with the curriculum and assessments. The ability to easily see the student's current curriculum and recent assessment results will be critical to the progress monitoring. This will also aid the ES creating the plans.

Requirements

- Create a Student Education Plan (SEP), Individualized Education Program (IEP), 504 Plan, Behavior plans, Intervention plans, Tutor plans and documentation to keep the history of all plans with a particular student and the outcomes of those plans.
- Ability to track IEPs with various data points for goals and assessments.
- Ability to create Intervention plans with goals and follow-ups.
- Ability to easily see all plans for a student, family, class or teacher.
- Ability to add progress monitoring logs.
- Visibility to current curriculum and resources in use.
- Easy visibility to assessment results.

User Stories

- As Staff, I want to easily create IEPs, so that I can provide the best learning opportunities to each student.
- As Staff, I want to build and plan Interventions Plans, so that I can help students that may have fallen behind and get them back on track.
- As a Teacher, I want to see all IEPs/Intervention Plans for my students, so that I can be aware of and target the student's educational needs.

Additional Considerations, Connections or Comments

There is a lot of overlap between this and the LMS module.

Module #10: User Management, Notifications, Security & Regulations

Business Objectives

The main user groups are employees (Admin & Staff) and clients (Students & Parents). The employees will be daily users and will be able to learn a possibly more complex system with many different features. However, the client users will be limited and will require a very simple and controlled user experience. Ideally there is little to no training needed when onboarding new clients.

Additionally, the standard platform features for user access controls is also expected.

The estimates of users is as follows; 50-75 Admin/Staff, 700 Students and 350 Parents.

Requirements

- Standard user options, such as invites, password management, username, profile, etc.
- User role and access permissions
- Compliant with all security and information protection requirements such as FERPA
- System Documentation
- General guides and training material for all user classifications.
- Email notifications should be configurable based on given triggers within the system.
- Bonus options would include text message alerts, or even two way text messaging with logs.

User Stories

- As a User, I want to be sure my information is safe and secure.
- As a User, I want the interface to be simple and descriptive, so that I can easily navigate.

- As an Admin, I want to be as hands off as possible to the usage of the application, so that I can focus on education rather than IT support.
- As an Admin, I want to easily invite new users.
- As an Admin, I want to be able to adjust the permissions or roles of my staff, so that I can properly manage access based on current job functions.

Additional Considerations, Connections or Comments

Roughly 90% of the users will be parents and students. Their usage will be very casual and focused. It is expected that it should not require formal training to onboard them to the application. User help pages and FAQs would be important to enable a 'self-service' mentality. It's just not feasible for us to train 300-500 new users each August. Any time needed to create this documentation and material should be included in the proposal.

Module #11: General Requests

Business Objectives

We are hopeful to build a best in class system that will allow for a higher level of education and quality of service to our students. As part of this, it needs to be built on modern technology and designed to scale. With that goal, these additional general requirements are some of the features needed to get there.

Requirements

- Mobile app or mobile web friendly.
- Web based application that can be accessed anywhere.
- Ability to embed application information directly into the CGA website.
- Integration options (API/SDK) to connect with other systems as needed.
- Robust and easy reporting feature to view all system information and student performance by student, Teacher, grade, location curriculum, use of ST Math, etc.

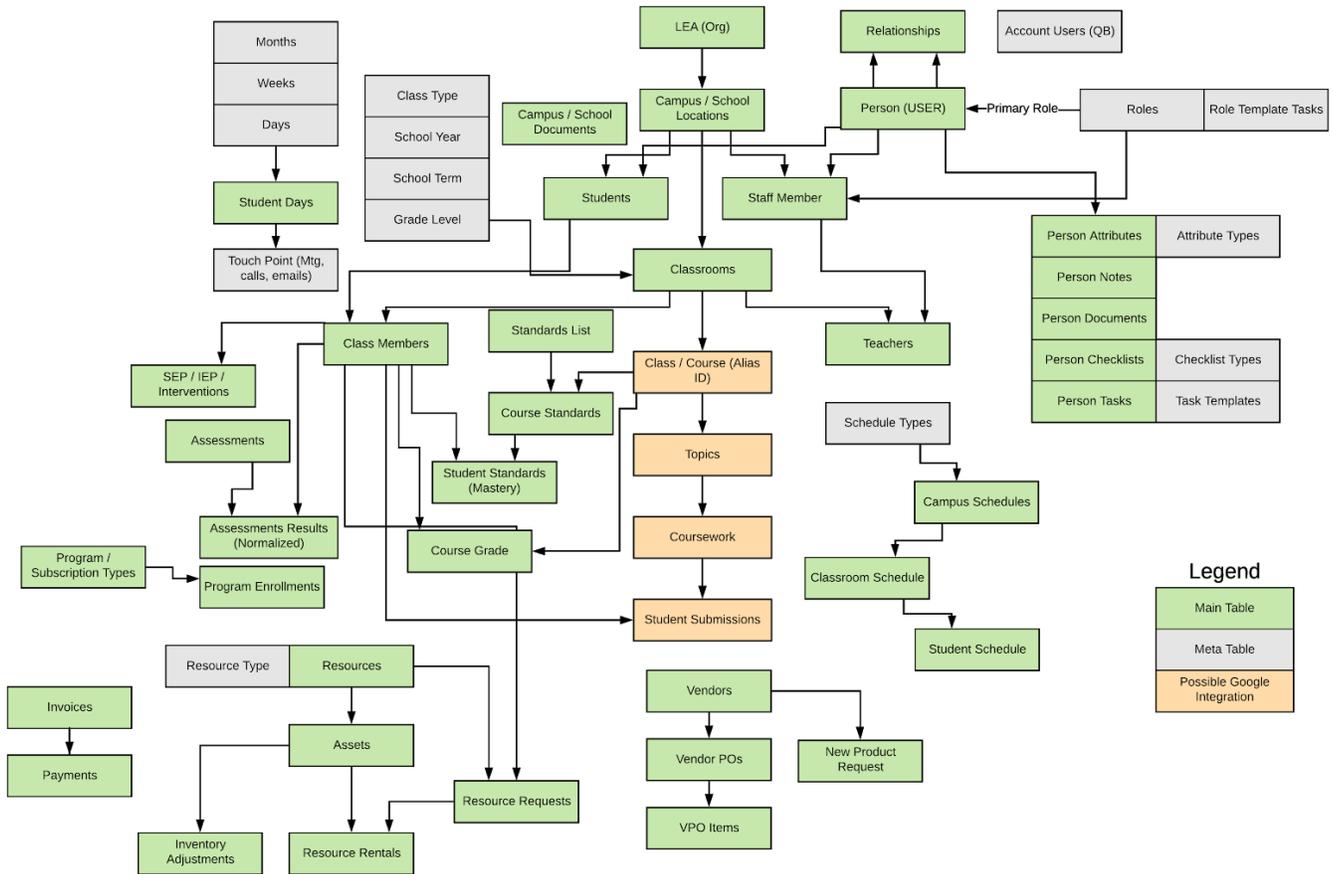
Additional Considerations, Connections or Comments

We anticipate the need for continual improvements and feature enhancements. The proposal should also include the cost for; additional users, application support, feature enhancements or new feature add-ons.

If a custom platform is used, access to the system documentation and/or API documentation is expected.

Database Schematic

This database entity relation diagram (ERD) is not 100% of the information needed, and many of the table-to-table connections are not represented for legibility. This is offered as an example, and is not exhaustive of all needs. It does represent many of the modules and datasets needed to fulfill the requirements, and is provided to give additional information and relational context.



Rating Proposal

Each proposal will be evaluated on the following criteria:

1. Project Timeline (20 points): Offeror's ability to deliver a completed project by August, 2021
2. Project Cost (30 points): Offeror's total cost for the project, including design, development, and deployment.
3. Project Fidelity (30 points): Offeror's ability to deliver on the system requirements detailed above..
4. Project Experience (20 Points): Offeror's experience in working with and developing educational and operational software.

Proposal Selection

All proposals should meet the minimum requirements under each of the aforementioned modules. CGA anticipates the procurement process to result in a public-private partnership.