



Solicitation Information

17 Jan 06

RFP # B05972

TITLE: Comprehensive Adult Literacy Information System - RIDE

Submission Deadline: 22 Feb 06 @ 2:00 PM (Eastern Time)

<p>PRE-BID/ PROPOSAL CONFERENCE: Yes Date: 7 Feb 06 Time: 9:30 AM Mandatory : No Location: Department of Administration / Division of Purchases (Bid Room), One Capitol Hill, Providence, RI</p>
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Questions concerning this solicitation may also be e-mailed to the Division of Purchases at questions@purchasing.state.ri.us no later than **6 Feb 06 at 12:00 Noon (ET)** .Questions should be submitted in a *Microsoft Word attachment*. Please reference the RFP / LOI # on all correspondence. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information.

<p>SURETY REQUIRED: No</p>

<p>BOND REQUIRED: No</p>

Jerome D. Moynihan, C.P.M., CPPO
Administrator of Purchasing Systems

Vendors must register on-line at the State Purchasing Website at www.purchasing.ri.gov.

NOTE TO VENDORS:

Offers received without the entire completed three-page RIVP Generated Bidder Certification Form attached may result in disqualification.

THIS PAGE IS NOT A BIDDER CERTIFICATION FORM

The Rhode Island Department of Administration, Office of Purchases, on behalf of the Rhode Island Department of Elementary and Secondary Education (RIDE) is requesting Proposals from qualified individuals to provide and implement a Comprehensive Adult Literacy Information System (CALIS) - a participant-level relational database and management information system, in accordance with the terms of this solicitation and the State's General Conditions of Purchase (available at www.purchasing.ri.gov).

1 INSTRUCTIONS AND NOTIFICATIONS TO BIDDERS:

- All respondents **MUST** register online at the RIVIP's Internet website @ <http://www.purchasing.state.ri.us>. Proposals must be in accordance with the guidelines outlined in this request and the state's general conditions of purchase which can be accessed through the website.
- A fully completed and signed *RIVIP Bidder Certification Cover Sheet – All three pages should accompany response submitted*. Failure to make a complete submission inclusive of this three-page document may **result in disqualification**.
- Should there be a need for technical assistance in registering and/or downloading any document, call the RIVIP HELP DESK @ (401) 222-2142, ext. 134. Office Hours: 8:30 AM – 4:00 PM.
- All costs associated with developing or submitting documents in response to this Request and/or in providing oral or written clarification of its content shall be borne by the respondent. The State assumes no responsibility for these costs.
- It is intended that an award pursuant to this Request will be made to a prime respondent, who will assume responsibility for all aspects of the work.
- All pricing submitted will be considered to be ***firm and fixed*** unless otherwise indicated herein.
- Submissions in response to this solicitation are considered to be irrevocable for a period of not less than sixty (60) days following the established due date and may not be withdrawn without the express written permission of the State Purchasing Agent.
- Responses misdirected to other State locations or which otherwise are not received by the State Division of Purchases by the established due date for any cause will be determined to be late and may not be considered. The office clock, for the purpose of registering the arrival of a document, is in the reception area of the Department of Administration (DOA), Division of Purchases, One Capitol Hill, Providence, Rhode Island.
- Respondents are advised that all materials submitted to the State for consideration will be considered to be public records as defined in Title 38, Chapter 2 of Rhode Island General Laws, without exception, and will be released for inspection immediately upon request once an award is made.
- During the life of this contract, the State reserves the right to solicit separately for selected initiatives within this scope of work.
- In accordance with Title 7, Chapter 1.1 of the General Laws of Rhode Island, no foreign corporation shall have the right to transact business in the state until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040). This will be a requirement only of the successful bidder (s).
- Offerors are advised that all materials submitted to the State of Rhode Island for consideration in response to this Request for Proposals will be considered to be public records, as defined in Title 38 Chapter 2 of the Rhode Island General Laws, without exception, and will be released for inspection immediately upon request, once an award has been made.

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- It is intended that an award pursuant to this Request will be made to a prime contractor, who will assume responsibility for all aspects of the work. Joint venture and cooperative proposals will not be considered, but subcontracts are permitted, provided that their use is clearly indicated in the offeror's proposal, and the subcontractor(s) proposed to be used are identified in the proposal.
 - The State of Rhode Island has a goal of ten per cent (10%) participation by MBE's in all State procurements. For further information, visit the web site www.rimbe.org. To speak with an M.B.E. Officer, call (401) 222-6253.
 - Interested parties are instructed to peruse the Division of Purchases web site on a regular basis, as additional information relating to this solicitation may be released in the form of an addendum to this RFP / LOI

Equal Employment Opportunity (RIGL 28-5.1)

§ 28-5.1-1 Declaration of policy. – (a) Equal opportunity and affirmative action toward its achievement is the policy of all units of Rhode Island state government, including all public and quasi-public agencies, commissions, boards and authorities, and in the classified, unclassified, and non-classified services of state employment. This policy applies in all areas where the state dollar is spent, in employment, public service, grants and financial assistance, and in state licensing and regulation. For further information, contact the Rhode Island Equal Employment Opportunity Office, at 222-3090

The State reserves the right to accept or reject any or all options, bids, proposals, to award on the basis of cost alone, and to act in its best interest.

At any point during the review process, any proposal found to be substantially non-responsive will be dropped from further consideration.

The State may, at its sole option, elect to require presentation(s) by respondents clearly in consideration for award. Other submissions, certifications, or affirmations may be required, as appropriate.

2 PROJECT BACKGROUND/OVERVIEW

Adult Basic Education consists of learning experiences and supportive services that enable persons to acquire the basic skills and knowledge necessary to function as responsible and productive citizens. Adults are helped to achieve many objectives: personal, social, job and career development, preparation for family responsibilities, becoming a wiser consumer, and coping with an increasingly complex, crowded and rapidly changing world.

In the 2004-2005 program year, the total number of Rhode Island adults who participated in Adult Basic Education programs reached approximately 10,000 persons. Many of these people improved their reading or math skills or completed studies which prepared them for the high school equivalency examination or increased their ability to speak English. This learning is done in a friendly environment working with teachers who are sensitive to the needs of adults.

The Rhode Island Department of Elementary and Secondary Education funds programs to establish free access to basic adult education services in public school systems, public agencies, and community based organizations across the State. These learning experiences and supportive services are for residents of Rhode Island age 16 or older. The services are designed to enhance the individuals: literacy skills - their ability to read, write, and speak English and to compute and solve problems at levels of proficiency necessary to function as parents/family members, workers, and members of the community. Programs

offer activities to prepare students for passing a high school equivalency assessment and moving on to post-secondary education or vocational training and/or acquiring or advancing in employment.

The National Reporting System (NRS), the accountability system for the adult education program, requires states to report on measures of student outcomes, demographics, and program attendance and participation. While the NRS requires that local adult education programs in each state use individual student record systems to maintain their data for reporting, there are no further specifications or requirements for the system. Each state has had to develop its own approach toward the design and implementation of its data system. Consequently, several different types of data systems have arisen, and there is great variation among the states in the level of resources they have invested in the development and maintenance of their management information systems. After several years of experience using data systems, and with the rapidly changing pace of technology, many states are now revising their NRS data systems.

We are in a new era of adult basic education: high standards, accountability and ABE Center(s) improvement. Data analysis tools are no longer optional; they are now necessary to meet the requirements of the new workplace and new federal standards. Within this new environment, we have concluded that a comprehensive, data-driven decision support system is needed so that adult educators will be able to comply with new federal reporting and performance standards, to use data to evaluate and plan ABE programs, to justify spending, and to inform all interested parties involved in adult basic education.

After carefully analyzing other state adult education modernization initiatives, we have determined that an implementation of centralized application software and analytical data tools across RIDE and ABE Centers is the foundation for a data-driven, intelligent decision support system. This centralized system will ensure consistent data standards, data accuracy, and data currency by initially implementing scheduled ABE data collections throughout the state and will eliminate the costly duplication of information. This new system, Comprehensive Adult Literacy Information System (CALIS), will also enable state and local ABE educators to use data to evaluate and plan programs, to justify spending, to differentiate instructional practices and to inform all interested parties including adult education students. CALIS will also provide the analytical information to not only support informed adult education decisions but also to measure the results of these decisions.

The RIDE ABE office currently manually collects large quantities of data about ABE centers, such as student records on demographics, enrollment, attendance, curriculum, and academic performance. These data are currently not available in a timely fashion, nor are they easily accessible, and the focus is more on compliance than on performance outcomes. As a result, the State is limited in its capacity to support research on ABE student performance and other factors associated with improving achievement of all ABE students and reducing achievement gaps between different subgroups of ABE students. The State's capacity to exchange data across institutions within the State and among the States, and the ability to provide reports or ad hoc analyses to a wide range of stakeholders is also limited.

Moreover, this information is not effectively shared among ABE programs and other organizational entities. Without a data storage infrastructure based on common standards, it is often difficult to see relationships among the various data points.

RIDE's ABE needs at present are not primarily concerned with data collection. RIDE is now focused on issues of the use of ABE data and information. The Department's rich data resources reside in static form, in separate boxes or "silos," generally with no links to one another. There is no way, in the current system, to show ABE student progress over time. Each year's report is a separate and distinct document.

Our current system is faced with an increasing number of ABE Centers in need of support and with federal compliance and changing workplace pressures, we need a data system that can easily generate and transmit reports across institutions and within the state, that can respond rapidly to all queries regarding academic indicators, that can create reports to display the data on either a longitudinal or a

comparative scale, and that has different levels of access and utility, on a password-protected basis, so that all data, down to the individual ABE student level, can be stored within a uniform and seamless data system.

Ultimately, the implementation of the CALIS will result in an increased capacity for ABE Center administrators, teachers and the RIDE ABE Office to use computer software tools to integrate data, apply standards and measures, analyze results, determine outcomes, explore best practices and adjust ABE education programs and instructional procedures.

3 SCOPE OF WORK

3.1 Task Summary

3.1.1 CALIS INFRASTRUCTURE COMPONENTS

The Bidder must agree, in its proposal, to provide a relational database CALIS infrastructure that integrates summary and detailed ABE information for the CALIS data domains that group data into pre-defined categories or domains. Eventually, It is desirable that the Bidder proposes functionality that will integrate the CALIS data domains into a layered data architecture.

3.1.2 ABE CENTER TO CALIS DATA MAPPING

The Bidder must agree, in its proposal, to provide a mapping facility that allows CALIS to collect information from a variety of data sources and normalizes its code datasets into standard values and formats prior to loading it into the integrated CALIS data infrastructure thereby ensuring a match to corresponding data elements in the NRS data handbooks

3.1.3 NRS REPORTING COMPLIANCE

The Bidder must agree, in its proposal, to provide a methodology that ensures proper compliance with NRS Reporting standards and requirements.

3.1.4 EXTRACT, TRANSFORM, AND LOAD CALIS COMPONENT

The Bidder must agree, in its proposal, to provide an Extract, Transform, and Load component that cleanses, standardizes, integrates and loads ABE Center data. This component must be able to extract the data from the ABE Center preferably using either web-based data entry into the CALIS or a file transport methodology before the end of Phase 1 of this project.

3.1.5 RIDE AND ABE CENTER READINESS SUPPORT

The Bidder must agree, in its proposal, to assist the ABE Centers in conducting a data inventory of State and local information to identify data that will be used in CALIS by reviewing the data inventory to ensure accuracy and completeness. The Bidder must propose an ETL methodology that enables RIDE ABE and the ABE Centers to be self sufficient in providing ongoing support for CALIS after its implementation.

3.1.6 TECHNICAL TRAINING / KNOWLEDGE TRANSFER

The Bidder must agree, in its proposal, to provide technical training on its CALIS solution. RIDE ABE, RIDE ABE Center and/or RIDE Office of Network and Information Systems (ONIS) personnel will be assigned for technical training. This training and knowledge transfer shall enable RIDE ABE, ONIS and ABE Center personnel to be self-sufficient managers of the CALIS system upon completion of the project.

3.1.7 OPERATIONAL DOCUMENTATION

The Bidder must agree, in its proposal, to provide Operational Documentation that outlines, in detail, the operational procedures of CALIS.

3.1.8 DATABASE DOCUMENTATION

The Bidder must agree, in its proposal, to provide CALIS Database Documentation that outlines, in detail, the physical data model, data elements, platform specific Data Definition Language (DDL) and logical models are documented and published. These include both informational and navigational meta data. This information provides RIDE ONIS application developer and database administrator support staff any relevant details necessary for maintaining CALIS. It also provides a common foundation of knowledge on which customers can communicate with the technical support team regarding proposed enhancements and improved functionality.

3.1.9 Tasks By Phase

Please refer Appendix A: Budget Form 3 for additional project tasks and deliverables by project phase. The Bidder must agree, in its proposal, to perform the tasks and meet the deliverable as specified in Appendix A: Budget Form 3.

3.2 Project Schedule

Following are the due dates by which the listed components of the project must be completed.

3.2.1 PHASE 1A: CALIS– (MARCH 1, 2006 – JUNE 30, 2006)

3.2.1.1 Discovery of CALIS Version 1.0 Module Requirements

During Phase 1 the Bidder must agree, in its proposal, to conduct discovery sessions with RIDE ABE Departments to determine their CALIS requirements and to assess the state of their data content. Immediately following issuing of the contract, the winning Bidder must agree, in its proposal, to meet with RIDE staff to identify any customizations required to the vendor's existing product. In addition to cosmetic customizations, changes are likely to include (but are not limited to) vendor lists and award lists/project number lists.

The Bidder must agree, in its proposal, that the system to be implemented in Phase I to meet the functional requirements specified in Appendix B: Section 1.5.4 and the data requirements (Table 1), system functions (Table 2) and to be able to apply the processing rules, as specified (Table 3), as specified in the Appendix B: Section 1.5.5.

3.2.1.2 Requirements Validation of CALIS Version 1.0 Modules

The Bidder must agree, in its proposal, to validate the business requirements for the Comprehensive Adult Literacy Information System (CALIS);

3.2.1.3 Software Load of CALIS Version 1.0 Modules

The Bidder must agree, in its proposal, to load the Base version of its CALIS software on to server hardware specified by RIDE.

3.2.1.4 Customization of CALIS Version 1.0 Modules

The Bidder must agree, in its proposal, to make the required customization changes based upon the information gathered from the Discovery and Requirements validation segment and submit them for approval to RIDE no later than 60 days following issuance of the contract.

3.2.1.5 Initial Training of CALIS Version 1.0 Modules

Upon RIDE approval of the customized CALIS Base application, the Bidder must agree, in its proposal, to provide training to all award recipients and complete this training no later than April 30, 2005.

3.2.1.6 Implementation of CALIS Version 1.0 Modules

The Bidder must agree, in its proposal, to work with the hardware provider to load the CALIS Base Version 1.0 software application on all computers before they are installed and will launch the system at a date to be agreed upon but no later than May 15, 2006.

3.2.1.7 24/7 Implementation support of CALIS Version 1.0 Modules (NRS-compliant system)

The Bidder must agree, in its proposal, to provide 24/7 support of its implementation of the RIDE CALIS application software

3.2.1.8 Implementation of ETL module to upload data for Version 1.0

The Bidder must agree, in its proposal, to – based on Bidder and RIDE input and subject to RIDE approval – to develop a module that allows local programs that have functional databases to upload their data into the system.

3.2.2 Phase 1b: CALIS Version 1.0 (July 1, 2006 – December 31, 2006)

3.2.2.1 Training

The Bidder must agree, in its proposal, to provide refresher training in the use of the system and specific training on the additional modules as early as possible in FY2007 but no later than August 31, 2006 at a time to be agreed upon with RIDE.

3.2.2.2 Implementation and 24/7 support of CALIS Version 1.0 NRS-compliant Reporting System

The Bidder must agree, in its proposal, to implement Version 1.0 no later than December 31, 2006 or an alternative date to be decided by RIDE.

3.2.2.3 Discovery of CALIS Version 1.1 Module RIDE Custom Requirements

The Bidder must agree, in its proposal, to solicit input from local programs regarding the development of various modules required by RIDE as part of or subsequent to the initial training or to be scheduled at a different time convenient to RIDE, the local programs, and the vendor, the vendor . The Bidder must agree, in its proposal, to take this input under advisement and will review it with RIDE staff. The Bidder must agree, in its proposal, to consider only those items approved by RIDE in the development of Version 1.1.

3.2.3 PHASE 2A: CALIS VERSION 1.1 – (JANUARY 1, 2007 – JUNE 30, 2007)

The Bidder must agree, in its proposal, to implement Version 1.1 no later than June 30, 2007 or an alternative date to be decided by RIDE.

3.2.3.1 Customization and Implementation of Expanded Demographics Module

The Bidder must agree, in its proposal, to customize, based on vendor and RIDE input and subject to RIDE approval and to implement the following CALIS components for CALIS Version 1.1. :

- Volunteer Tutor Component;
- Wait List, Student/Slot Funding Component;
- Class Offerings And Availability Component;
- Special Project (Project Opportunity) Component;
- Report Card Component.

The Bidder must agree, in its proposal, to add to the Demographics Data Elements Section, based on vendor and RIDE input and subject to RIDE approval . The Bidder must agree, in

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- its proposal, to include at a minimum, the following data elements: schooling/education, labor force status, nativity, year arrived in US, language most frequently spoken at home, household size, composition, and income, and English speaking and writing ability. The definitions of these data elements must be the same as the U.S. Census. In addition, self-reported ability to read and write in one's native language must be included.
- 3.2.3.2 Customization and Implementation of Volunteer Tutor Component
- The Bidder must agree, in its proposal, to customize the Volunteer Tutor component module is an elaboration of the class component of a system to more specifically capture the various ways that volunteer programs deliver services.
- 3.2.3.3 Customization and Implementation of Wait List Component
- The Bidder must agree, in its proposal, to customize the CALIS Wait List component -- based on definitions to be approved by RIDE – to include personal identification information, the date of registration, the date of wait-listing, the preferred schedule, the assessed level, the desired service, and basic demographic information such as age, gender, race/ethnicity, and prior schooling.
- 3.2.3.4 Customization and Implementation of Student/Slot Funding Component;
- The Bidder must agree, in its proposal, to customize the CALIS Student/Slot Funding Components to identify the different ways that various local programs use to fund students. The Bidder must also agree, in its proposal, to support the following funding methods: (1) all students in a class are funded by a specific funding source, (2) the slots or seats in a class are funded by various funding sources, and (3) specific students are funded by a funding source.
- 3.2.3.5 Customization and Implementation of Class Offerings and Availability Module
- The Bidder must agree, in its proposal, to customize the CALIS Class offerings and Availability Component to enable any user of the system (including but not limited to One Stop Career Center Operators and prospective students) to see what services are available in what community, what the next available date is that a seat may become available, and how the program can be contacted.
- 3.2.3.6 Customization and Implementation of Special Project Module
- The Bidder must agree, in its proposal, to customize the CALIS Special Project Component to capture the data elements required by recipients of Project Opportunity awards (Please, refer to Attachment B: section 1.5.5)
- 3.2.3.7 Customization and Implementation of Report Card Module
- The Bidder must agree, in its proposal, to customize the CALIS Report Card Component will be based on the report card developed by ARI using NRS data, as posted on the NRS website: <http://nrsw.org>.

Note: These Components must be ready in time for FY2007 data entry.

3.2.4 Phase 2b CALIS Version 1.2 (July 1, 2007 – August 30, 2007)

3.2.4.1 Discovery of CALIS Version 1.2 Modules

The Bidder must agree, in its proposal, to consult with local and professional development providers and relevant state agencies. For the development of modules to be launched in Version 1.2., the Bidder must agree, in its proposal, to consult with local providers, the provider of professional development activities, and relevant state agencies such as the Department of Labor and Training and the Office of Higher Education to identify the proposed data elements and basic functions involved. The Bidder must agree, in its proposal,

to review suggestions for data matching, professional development, and fiscal modules with RIDE and implement those approved by RIDE.

3.2.4.2 Customization of CALIS Version 1.2 Modules

The Bidder must agree, in its proposal, to develop and test the CALIS Data Matching, Professional Development, and Fiscal Components in time for a September 1, 2007 implementation of Version 1.2.

3.2.4.3 CALIS Version 1.2 Training

The Bidder must agree, in its proposal, to provide refresher training in the use of the CALIS system and specific training on the additional modules as early as possible in FY2008 but no later than August 31, 2007 at a time to be agreed upon with RIDE.

3.2.4.4 CALIS Version 1.2 Implementation and Support

The Bidder must agree, in its proposal, to implement Version 1.2. no later than September 1, 2007 or an alternative date to be decided by RIDE.

3.2.5 Phase 3 CALIS Version 1.3 Customization: September 1, 2007 – June 30, 2008

3.2.5.1 Discovery of CALIS Version 1.3 Modules

The Bidder must agree, in its proposal, to consult with local providers and public stakeholders for the development of modules to be launched in Version 1.3., The Bidder must agree, in its proposal, to consult with local providers and public stakeholders to identify the proposed data elements and basic functions involved. The Bidder must agree, in its proposal, to review suggestions for the Case Management/Counseling, Contact Management, Cost Effectiveness, Content Standards, and Public Access components with RIDE and to implement those approved by RIDE. The Bidder must agree, in its proposal, to develop and test the modules in time for a September 1, 2008 implementation of Version 1.3.

3.2.5.2 Customization of CALIS Version 1.3 Case Management/Counseling Module

3.2.5.3 Customization of CALIS Version 1.3 Contact Management Module

3.2.5.4 Customization of CALIS Version 1.3 Cost Effectiveness Module

3.2.5.5 Customization of CALIS Version 1.3 Content Standards Module

3.2.5.6 Customization of CALIS Version 1.3 Public Access Module

3.2.6 Phase 4a: CALIS Version 1.3 Implementation; July 1, 2008 – December 31, 2008

3.2.6.1 CALIS Version 1.3 Training

The Bidder must agree, in its proposal, to provide refresher training in the use of the system and specific training on the additional modules as early as possible in FY2009 but no later than August 31, 2008 at a time to be agreed upon with RIDE.

3.2.6.2 CALIS Version 1.3 Implementation

The Bidder must agree, in its proposal, to complete Implementation and provide 24/7 Support of Version 1.3. The Bidder must agree, in its proposal, to implement Version 1.3. no later than September 1, 2008 or an alternative date to be decided by RIDE.

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- 3.2.7 Phase 4b: CALIS Version 2.0 Development/Customization and Implementation; January 1, 2009 – June 30, 2009
- 3.2.7.1 CALIS Version 2.0 Discovery: Analytic Modules
The Bidder must agree, in its proposal, to meet with RIDE staff and selected local programs to determine desired analytic modules.
- 3.2.7.2 CALIS Version 2.0 Development/Customization : Analytical Modules
The Bidder must agree, in its proposal, to complete the development of the Analytical Modules prior to June 30, 2009.
- 3.2.7.3 CALIS Version 2.0 Training: Analytical Modules
The Bidder must agree, in its proposal, to provide refresher training in the use of the system and specific training on the additional modules before June 30, 2009.
- 3.2.7.4 CALIS Version 2.0 Implementation: Analytical Modules
The Bidder must agree, in its proposal, to provide Implementation and 24/7 support for Version 2.0. The vendor must implement CALIS Version 2.0 on or before June 30, 2009.
- 3.2.7.5 Technical And User Documentation
The Bidder must agree, in its proposal, to provide technical and user documentation for the Comprehensive Adult Literacy Information System (CALIS).
- 3.2.8 Transition planning
During the months of March through June 2009, the vendor and RIDE will discuss the future support of the information system and RIDE will determine the conditions under which the contract will be extended or any scenarios where the vendor will gradually transition responsibilities for the system to RIDE.
- 3.2.9 Project Management and Reporting
The Bidder must agree, in its proposal, to perform any Project Scheduling, Project Deliverable, Implementation Planning, System Operational Planning, and Scheduled Project Status Reporting tasks specified in this section and all other specifications and deliverables as outlined in Appendix B: Section 1.5 of this RFP.
- 3.3 Project Deliverable Summary
- 3.3.1 ABE CENTER SYSTEM ANALYSIS
The Bidder must agree, in its proposal, to a report of the current software and capability of each ABE Center in the state and how they gather, process, and report the data in the core collections.
- 3.3.2 MODEL STATEWIDE EDUCATION SYSTEM DESIGN
The Bidder must agree, in its proposal, to a description of what a statewide education data system would look like and how it would operate. The description must include high level data flow patterns and the boundaries between the various jurisdictions.
- 3.3.3 TECHNICAL TRAINING / KNOWLEDGE TRANSFER
The Bidder must agree, in its proposal, to provide a technical training for CALIS. RIDE and ABE Center personnel, as appropriate, to be assigned for CALIS user and technical training. This training and knowledge transfer shall enable RIDE and ABE Center personnel to be self-sufficient managers of CALIS upon completion of the project.

3.3.4 IMPLEMENTATION PLAN

The Bidder must agree, in its proposal, to provide a plan for implementing the statewide data system in the RIDE and for each ABE Center. The plan must include required hardware, software, development, etc. that may need to be purchased. It should include training needed, personnel qualifications, and implementation timelines.

3.3.5 SYSTEM OPERATION PLAN

The Bidder must agree, in its proposal, to provide a plan for how the operation of CALIS will be governed and an initial set of operational policies and procedures.

3.3.6 DOCUMENTATION

The Bidder must agree, in its proposal, to provide technical and user documentation CALIS.

3.3.7 ONGOING SUPPORT PLAN

The Bidder must agree, in its proposal, to provide ongoing support for CALIS.

3.3.8 SCHEDULED REPORTING

3.3.8.1 Bi-weekly project updates

The Bidder must agree, in its proposal, to participate in weekly onsite project status meetings to update RIDE and the RIDE ABE management team on progress.

3.3.9 Deliverables by Phase

Please refer Appendix A: Budget Form 3 for project tasks and deliverables by project phase. The Bidder must agree, in its proposal, to perform the tasks and meet the deliverable as specified in Appendix A: Budget Form 3.

4 ADDITIONAL CONTRACTOR REQUIREMENTS/QUALIFICATIONS:

4.1 Transmittal Letter

Bidders must submit a letter of transmittal signed by an owner, officer, or other authorized agent.

4.2 Relevant Organizational Information

Bidders must submit relevant organizational information, a list of similar projects undertaken and/or clients served, agency expertise relative to the services requested, and a statement of existing workload as it impacts the performance of the project.

4.3 Key Personnel Assigned to Project

Bidders must provide an overview of key personnel assigned to the project including education and prior experience.

4.4 Subcontractor Disclosure

Bidders must disclose any work to be sub-contracted including the specific work to be performed and staffing, organizational structure, and business background of the sub-contractor.

4.5 Approach to meeting Business Requirements

The Bidder must describe its proposed approach to meeting the business requirements and specifications set forth in this section. This section should also identify any proposed sub-awarded Bidders, and describe their role in the project. Sub awarded Bidders not identified in the Proposal will not be permitted without the written approval of the RIDE.

4.6 Prior Implementation Plan

Bidders must include in their response a copy of an implementation plan that your group has prepared in the past. Please select an implementation that you have prepared and utilized that is as closely related to this project as possible. The Selection Committee will use the submitted implementation plan an example of the quality and completeness that we can expect should you be awarded the contract.

4.7 Proposed Solution

The Bidder must confirm, at a minimum, that the proposed solution meets each of the stated requirements. Where required, the Bidder must also provide detailed responses. If the Bidder's solution does not meet a requirement but can propose an alternative method or approach that meets the intent of the requirement then the Bidder must describe the alternative, major considerations, implications, assumptions and expected results. The RIDE Selection Committee will abide by provisions in this RFP for reviewing alternative approaches. The RIDE Selection Committee will review the proposed alternative and consider the proposed merits.

In any event, the RIDE Selection Committee's decision for acceptance or rejection of the proposed alternatives will be final. The RIDE Selection Committee uses the terminology "**Components**", to delineate core functionality that would normally be mapped to a specific user function. The RIDE Selection Committee acknowledges that proposed Bidder solutions may not be defined or characterized by the Bidder in this manner. Some Bidders may consider certain components or modules part of the same task or functionality. As long as the required functionality is provided and is clarified in the proposal in all appropriate sections, then combinations are acceptable to the RIDE Selection Committee.

4.8 Vendor Background, Qualifications, And Previous Experience

In this section, the Bidder should describe the firm's background and its experience in managing and completing ABE application software projects for other government and/or private industry clients that are similar in scope to the RIDE CALIS project defined in this RFP. In addition, each bidder must provide a list of at least 3 agencies where it has designed, developed, and/or implemented ABE application software projects during the past five years. The bidder must also provide a list of at least 3 state agencies that use its CALIS software and that have been implemented during the past five years.

As part of this section, the Bidder must also provide a list of all State of Rhode Island contracts for application system development projects to which the Bidder has been a party in the last five years. Similar information should be provided for any sub-contractor that will play a significant project role, other than the provision of off-the-shelf hardware or software.

In addition, Bidders must demonstrate successful experience with the methodologies and technologies that they have proposed in their responses to the business and technical requirements of this RFP. It is also **desirable** that Bidders demonstrate familiarity and experience with implementing Adult Literacy Information Systems.

4.8.1 ORGANIZATION AND STAFFING

Firm Qualifications: In this section, the Bidder should describe the firm's background and its experience in managing and completing similar projects for other public elementary and secondary education agency clients. In providing this information, it is **desirable** that Bidders demonstrate successful experience with the various components of the ABE application software projects and management architecture, which has been proposed. It is also **desirable** that Bidders demonstrate a working familiarity with either the adult basic education system in Rhode Island or similar decentralized organizational structures I other states.

Staff Qualifications: Respondents are to include an profile of its staff's experience regarding the implementation its proposed solution. This staff profile must include people presently on staff, prior experience and/or qualification of key personnel to be assigned to the project. Staff assignments and concentration of effort for each staff member are to be addressed. Pay particular attention to information on the company's knowledge and implementation experience of the proposed ABE application software as well as the other requirements for the RIDE CALIS. Include qualifications and resumes of all the key personnel that will be involved in this project. This proposal should reflect a commitment of these staff members to this project should this proposal be selected. Respondent must demonstrate that staff has the knowledge and experience of similar ABE application software involving Web Services implementations.

Sub-Consultants: As applicable, disclosure of any sub-consultant agencies' organizational structure and business background as well as the type of work they will perform must be documented in response to this RFP. Full disclosure of the proposed team to be assigned to this project is required in the Technical Proposal.

References: Bidders must provide three references related to systems consulting work completed within the last five years or currently in process that is similar to the size and scope of work described in this RFP. References must include the firm name, contact person, address, phone number, and a description of the contractual relationship. References will be contacted by telephone and should be available between 9:00 - 5:00 EST. No RIDE employee may be used as a reference.

4.8.2 EXISTING WORKLOAD

Respondents are to include a current listing of all projects that they are currently contracted to perform.

5 TERMS OF THE CONTRACT

The **initial contract** will begin approximately **March, 2006** and end **December 31, 2008**. The scope of the work may be modified by RIDE prior to beginning work on a given task. RIDE retains the option of granting a time extension of up to **one year** with additional funding if available and if the level of work is expanded by mutual written consent. If necessary, deficiencies in performance of services and/or failure to supply deliverables in a complete and timely manner will be documented in writing by RIDE. Should a pattern of substantial dissatisfaction become apparent, RIDE reserves the right to terminate the contract.

6 COST PROPOSAL/TERMS OF PAYMENT

The awarded Bidder must prepare a cost proposal reflecting the hourly rate or other fee structure proposed for this scope of services using the Cost Proposal Forms contained in Appendix A. In addition, the Bidder, in its proposal, must include a cost breakdown by phase, major task, and Deliverable as identified in the Cost Proposal Template by Phase, Task, and Deliverable located in Appendix A. Cost proposals must fall within the range below for each period as follows:

FY06		\$100,000
FY07		\$175,000
FY08	Up to	\$100,000
FY09	Up to	\$125,000

The total cost of the **initial contract** is not to exceed **\$500,000**

7 PRE-PROPOSAL MEETING

A Pre-Proposal Meeting will be held on the date and time indicated on page one of this solicitation at the **Department Administration, Division of Purchases (2nd floor), One Capitol Hill, Providence, RI**. At this time all questions relative to the SOW as well as any questions regarding RIDE procedures and proposal format will be addressed. Persons requesting the services of an interpreter for the hearing impaired may obtain those services by calling (401) 222-4971 forty-eight hours in advance of the scheduled conference date. Questions received, if any, will be posted on the Internet as an addendum to this solicitation. It is the responsibility of all interested parties to download this information. For computer technical assistance, call the Help Desk at 401 222-2142, ext 134.

8 PROPOSAL SUBMISSION

All document pages are to be numbered in consecutive order.

Combined TECHNICAL/COST PROPOSAL ("original" plus FOUR (4) copies) submissions are to be either mailed or hand-delivered in a sealed envelope marked: **"RFP B05972_–"CALIS Comprehensive Adult Literacy Information System "** by the date & time listed on page one of this solicitation.:

**RI Dept of Administration
Division of Purchases
One Capitol Hill,
Providence, RI 02908-5855**

NOTE: Proposals misdirected to other State locations or which are otherwise not presented in the Division of Purchases by the scheduled due date and time will be determined to be late and may not be considered. The "official" time clock is located in the Division of Purchases Reception area.

9 EVALUATION AND SELECTION

Cost Proposals, Technical and Business Responses will be evaluated by the RIDE Comprehensive Adult Literacy Information System Component Selection Committee. The Committee will evaluate and score combined the Business, Technical, and Cost Proposals received utilizing the following criteria resulting in a final ranking and recommended selection:

9.1 Evaluation Criteria

Category	Points	Percent
1. Company Background	5	5%
2. Specific Project Experience (Company)	20	20%
2.1 Comprehensive Adult Literacy Information Implementation Experience		
3. Specific Staff Experience	20	20%
3.1 Comprehensive Adult Literacy Information System Implementation Experience		
4. Project Work Plan	5	5%

Category	Points	Percent
5. Technical Proposal	30	30%
6. Cost Proposal	20	20%
Total	100	100%

The bidders responses in the following categories will be evaluated according to, but not limited to, the following criteria:

9.1.1 COMPANY/ PROJECT / STAFF EXPERIENCE

- Subject Matter Comprehensive Adult Literacy Information System Experience
- Information Technology Experience

9.1.2 PROJECT WORK PLAN

- Project Plan and corresponding tasks specified by Bidder demonstrate an understanding of the Business and Technical Requirements of the Project;
- Projected timelines communicate an methodology of how proposed solution will be successfully implemented.

9.1.3 BUSINESS PROPOSAL

- Demonstrates Understanding of RIDE Comprehensive Adult Literacy Information System General Requirements
- Demonstrates Understanding of Comprehensive Adult Literacy Information System Business Requirements
- Demonstrates Understanding of Comprehensive Adult Literacy Information System Functional Requirements
- Demonstrates Understanding of Web Services Requirements

9.1.4 TECHNICAL PROPOSAL

- Communicates the Quality & Viability of Overall Proposed Solution

9.1.5 COST PROPOSAL

- Rate Competitiveness
- Time Estimate Viability

9.2 Evaluation Process

9.2.1 CLARIFICATIONS

The Selection Committee may request additional information to clarify/correct proposals. Clarifications/corrections provided in response to a clarification/correction request by RIDE shall become part of the Bidder's Proposal. The Bidder must be prepared to commit contractually to all claims and statements made in its Proposal.

9.3 Final Selection

The Technical Review Committee's final selection recommendation will be presented to the State's Architectural/ Engineering Consultant Services Selection Committee for consideration. Upon receipt of final selection approval from the Director of Administration, all respondents will be notified by the State that a final selection has been made.

Failure to respond to a Mandatory Requirement will result in Proposal disqualification and no points will be assessed. Proposals where responses are provided to Mandatory Requirements but do not meet the Mandatory Requirements may be disqualified, unless, in the judgment of the RIDE Selection Committee, an acceptable substitute is proposed. The level to which a Bidder

demonstrates that its product or services meets the requirements will factor into the scoring process. The proposal of Desirable Features will also be factored into evaluations. In addition, the following factors will be considered in the evaluation.

Proposals should include the following:

1. A completed and signed three-page RIVIP Bidder Certification Cover Form, available at www.purchasing.state.ri.us.
2. A Cost Proposal reflecting the hourly rate, or other fee structure, proposed for this scope of services, including completion of the Cost Proposal Summary form, enclosed, and
3. A *separate* Technical Proposal describing the qualifications and background of the applicant and experience with similar programs, as well as the work plan or approach proposed for this requirement.
4. A completed and signed W-9 (taxpayer identification number and certification). Form is downloadable at www.purchasing.state.ri.us.
5. In addition to the multiple hard copies of proposals required, Respondents are requested to provide their proposal in electronic format (CDRom or Diskette). Microsoft Word / Excel OR PDF format is preferable. Only 1 electronic copy is requested.

Appendix A

Required Budget Forms

Form 1: Budget

Form 2: Personnel Detail Sheet (One each for Fiscal Years
2006, 2007, 2008, 2009)

*Form 3: Cost Proposal Template by Phase,
Task, and Deliverable*

NOTE: The Bidder must complete all forms that are listed above and must include them in its proposal.

Budget Form # 1

Expense Category	Estimated Expenditures			
	FY06	FY07	FY08	FY09
1. Personnel				
2. Fringe Benefits				
3. Consultant				
4. In-State Travel				
5. Out-of-State Travel				
6. Printing				
7. Office Expense				
8. Telephone				
9. Educational Materials				
10. Equipment				
11. Data Processing				
12. Rental				
13 Other				
14.				
15.				
16.				
17.				
Subtotal				
Indirect Cost				
TOTAL				

It is understood and agreed that the amounts indicated above for the several line items are estimates of expenditures to be incurred by the Contractor on behalf of this Agreement and to be claimed by the Contractor for reimbursement under this Agreement. It is further understood and agreed that actual expenditures may vary from the estimates set forth above and that such variations shall not in themselves be cause for disallowance of reimbursement by RIDE; provided, however, that the Contractor shall notify and obtain the approval of the contract officer, in writing, if expenditures to be claimed for reimbursement in any line item above shall begin to vary significantly from the estimate given above; and provided further that unless permission of the contract officer shall have been obtained in advance, no expenditure shall be claimed by the Contractor for reimbursement by RIDE under this Agreement if such expenditure shall have been incurred in a line item category not listed above. Transfer of funds is permitted between Expense Categories (1) (2) and (3) up to 10% or \$25,000, whichever is less; all other transfers require prior written approval by the Department of Education.

For FY06 (ends June 30, 2006)
Budget Form 2: PERSONNEL DETAIL SHEET

NAME	POSITION TITLE	HOURLY RATE INCLUDING FRINGE \$	NUMBER OF HOURS	TOTAL ANNUAL SALARY & FRINGE \$
TOTAL REQUEST				\$

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$	TOTAL COST \$
TOTAL REQUEST			\$

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

For FY07 (ends June 30, 2007)
Budget Form 2: PERSONNEL DETAIL SHEET

NAME	POSITION TITLE	HOURLY RATE INCLUDING FRINGE \$	NUMBER OF HOURS	TOTAL ANNUAL SALARY & FRINGE \$
TOTAL REQUEST				\$

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$	TOTAL COST \$
TOTAL REQUEST			\$

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

For FY08 (ends June 30, 2008)

Budget Form 2: PERSONNEL DETAIL SHEET

NAME	POSITION TITLE	HOURLY RATE INCLUDING FRINGE \$	NUMBER OF HOURS	TOTAL ANNUAL SALARY & FRINGE \$
TOTAL REQUEST				\$

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$	TOTAL COST \$
TOTAL REQUEST			\$

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

For FY09 (ends June 30, 2009)
Budget Form 2: PERSONNEL DETAIL SHEET

NAME	POSITION TITLE	HOURLY RATE INCLUDING FRINGE \$	NUMBER OF HOURS	TOTAL ANNUAL SALARY & FRINGE \$
TOTAL REQUEST				\$

DETAIL OF CONSULTANT

NAME	POSITION TITLE	HOURLY RATE \$	TOTAL COST \$
TOTAL REQUEST			\$

EXPLANATION OF OTHER EXPENSES (i.e. travel, printing, office supplies, educational materials, and equipment)

EXPENSE CATEGORY	DESCRIPTION	COST

Budget Form 3: Cost Proposal Template by Phase, Task, and Deliverable

Phase	Due Date	Task	Deliverable	Cost
Discovery: Phase 1a		Validate the business requirements for the Comprehensive Adult Literacy Information System : Ver1-0	Business & Technical Requirements Assessment for CALIS base Version 1-0	
Planning: Phase 1a		Deliver Complete Detailed Project Plan for Phase 1	Phase 1 Project Plan	
Develop/Customize Q/A /Test: Phase 1a		Load RIDE CALIS Base Version 1.0 to hardware servers	RIDE CALIS Base Version 1.0 loaded	
Implementation: Phase 1a		Implementation of ETL module to upload data for Version 1.0; Upload Data to CALIS V1-0 database; Ready CALIS Version 1-0 that is NRS Reporting compliant for Implementation	ETL module to upload data for CALIS Version 1-0; CALIS V1-0 database with RIDE data; CALIS Version 1-0 that is NRS Reporting compliant available for Implementation	
Rollout: Phase 1a	6-30-2006	Train RIDE Users for NRS Reporting compliant CALIS 1.0; Rollout CALIS Base Version 1.0 that is NRS Reporting compliant to users	Training Materials; CALIS User Guide; Implement Operational CALIS Base Version 1.0 that is NRS Reporting compliant	
			Total Cost Phase 1a	
Discovery Phase 1b				
Planning Phase 1b				
Develop/Customize Q/A /Test - Phase 1b				
Implementation: Phase 1b		Ready NRS Reporting compliant-CALIS Version 1-0 for Implementation	NRS Reporting compliant-CALIS Version 1-0 available for Implementation	
Rollout – Phase 1b	12-31-2006	Train RIDE Users for NRS Reporting compliant -CALIS Version 1.0 Rollout is NRS Reporting compliant-CALIS Version 1.0 to users	Training Materials; CALIS User Guide; Implement Operational CALIS Version 1.0 that is NRS Reporting compliant	
			Total Cost Phase 1b	
Discovery Phase 2a		Validate the business requirements for CALIS V1-1	Business & Technical Requirements Assessment for CALIS base Version 1-2	
Planning Phase 2a		Develop Phase 2 Project Plan	Phase 2 Project Plan	
Develop/Customize Q/A /Test - Phase 2a		Customize ETL module to upload data for Version 1.1; Apply custom changes from requirements discovery processes to generate CALIS Ver1-1;	ETL module to upload data for CALIS Version 1-1; CALIS V1-1 database with RIDE data;	

Phase	Due Date	Task	Deliverable	Cost
Implementation: Phase 2a		Ready CALIS Version 1-1 for Implementation	CALIS Version 1-1 available for Implementation	
Rollout – Phase 2a	6-30-2007	Train RIDE Users for NRS Reporting compliant CALIS Version 1.1 Rollout CALIS Version 1.1 to users	Training Materials; CALIS User Guide; Implement Operational CALIS Version 1.1	
			Total Cost Phase 2a	
Discovery Phase 2b		Validate the business requirements for CALIS V1-2	Business & Technical Requirements Assessment for CALIS Version 1-2	
Planning Phase 2b		Update Phase 2 Project Plan	Updated Phase 2 Project Plan	
Develop/Customize Q/A /Test - Phase 2b		Customize ETL module to upload data for Version 1.2; Apply custom changes from requirements discovery processes to generate CALIS Ver1-2; Ready CALIS Version 1-2 for Implementation	ETL module to upload data for CALIS Version 1-2; CALIS V1-2 database with RIDE data; CALIS Version 1-2 available for Implementation	
Implementation: Phase 1b		Ready CALIS Version 1-2 for Implementation	CALIS Version 1-2 available for Implementation	
Rollout – Phase 2b	8-30-2007	Train RIDE Users for NRS Reporting compliant CALIS Version 1.2 Rollout CALIS Version 1.2 to users	Training Materials; CALIS User Guide; Implement Operational CALIS Version 1.2 that is NRS Reporting compliant	
			Total Cost Phase 1b	
Discovery Phase 3		Validate the business requirements for CALIS V1-3	Business & Technical Requirements Assessment for CALIS base Version 1-3	
Planning Phase 3		Develop Phase 3 Project Plan	Phase 3 Project Plan	
Develop/Customize Q/A /Test - Phase 3	6-30-2008	Customize ETL module to upload data for Version 1.3; Apply custom changes from requirements discovery processes to generate CALIS Ver1-3; Ready CALIS Version 1-3 for Implementation	ETL module to upload data for CALIS Version 1-3; CALIS V1-3 database with RIDE data; CALIS Version 1-3 available for Implementation	
Implementation: Phase 3				
Rollout – Phase 3				
			Total Cost Phase 3	
Discovery Phase 4a				
Planning Phase 4a				
Develop/Customize Q/A /Test - Phase 4a				

Phase	Due Date	Task	Deliverable	Cost
Implementation: Phase 4a		Ready CALIS Version 1-3 for Implementation	CALIS Version 1-3 available for Implementation	
Rollout – Phase 4a	12-31-2008	Train RIDE Users for NRS Reporting compliant CALIS Version 1.3 Rollout CALIS Version 1.3 to users	Training Materials; CALIS User Guide; Implement Operational CALIS Version 1.3	
			Total Cost Phase 4a	
Discovery Phase 4b		Validate the business requirements for CALIS V2-0	Business & Technical Requirements Assessment for CALIS V2-0	
Planning Phase 4b		Develop Phase 4 Project Plan	Phase 4 Project Plan	
Develop/Customize Q/A /Test - Phase 4b		Customize ETL module to upload data for CALIS Version V2-0; Apply custom changes from requirements discovery processes to generate CALIS V2-0; Ready CALIS Version V2-0 for Implementation	ETL module to upload data for CALIS Version 2-0; CALIS V2-0 database with RIDE data; CALIS Version V2-0 available for Implementation	
Implementation: Phase 4b		Ready CALIS Version V2-0 for Implementation	CALIS Version V2-0 available for Implementation	
Rollout – Phase 4a	6-30-2009	Train RIDE Users for NRS Reporting compliant CALIS Version V2-0 Rollout CALIS Version 1.3 to users Provide complete Technical & User Documentation	Training Materials; CALIS User Guide; Implement Operational CALIS Version V2-0 CALIS Technical & User Documentation	
			Total Cost Phase 4b	

Appendix B

Technical Requirements

Table of Contents

1	Technical Requirements	28
1.1	Scope Of Work.....	28
1.2	Project Deliverables.....	29
1.3	Implementation Schedule	30
1.4	Systems Software Environment	30
1.5	Systems Hardware Environment	30
1.6	Project Planning.....	38
1.7	Project Status Tracking & Reporting.....	38
1.8	User Training.....	39
1.9	Training Plan	40
1.10	Mandatory Requirements and Responses	40
1.11	Project Funding Considerations.....	41
1.12	Disclosure.....	41

1 TECHNICAL REQUIREMENTS

In this section, the Bidder must describe its proposed approach to meeting the technical requirements specifications set forth in this section.

1.1 Scope Of Work

1.1.1 TASKS

1.1.1.1 CALIS Infrastructure Components

The Bidder must agree, in its proposal, to provide a relational database CALIS infrastructure that integrates summary and detailed ABE information for the CALIS data domains that group data into pre-defined categories or domains. Eventually, It is desirable that the Bidder proposes functionality that will integrate the CALIS data domains into a layered data architecture.

1.1.1.2 ABE Center to CALIS Data Mapping

The Bidder must agree, in its proposal, to provide a mapping facility that allows ABE Centers to collect information from a variety of data sources and normalizes its code datasets into standard values and formats prior to loading it into the integrated CALIS data infrastructure thereby ensuring a match to corresponding data elements in the NRS data handbooks.

1.1.1.3 NRS Reporting Compliance

The Bidder must agree, in its proposal, to provide a methodology that ensures proper compliance with NRS Reporting standards and requirements.

1.1.1.4 Extract, Transform, and Load CALIS components

The Bidder must agree, in its proposal, to provide an Extract, Transform, and Load component that cleanses, standardizes, integrates and loads ABE Center data. This component must be able to extract the data from the ABE Center preferably using either web-based data entry into the CALIS or a file transport methodology before the end of Phase 1 of this project.

1.1.1.5 RIDE and ABE Center Readiness Support

The Bidder must agree, in its proposal, to assist the ABE Centers in conducting a data inventory of State and local information to identify data that will be used in CALIS by reviewing the data inventory to ensure accuracy and completeness. The Bidder must propose an ETL methodology that enables RIDE ABE and the ABE Centers to be self sufficient in providing ongoing support for CALIS after its implementation.

1.1.1.6 Technical Training / Knowledge Transfer

The Bidder must agree, in its proposal, to provide technical training on its CALIS solution. RIDE ABE, RIDE ABE Center and/or RIDE Office of Network and Information Systems (ONIS) personnel will be assigned for technical training. This training and knowledge transfer shall enable RIDE ABE, ONIS and ABE Center personnel to be self-sufficient managers of the CALIS system upon completion of the project.

1.1.1.7 Operational Documentation

The Bidder must agree, in its proposal, to provide Operational Documentation that outlines, in detail, the operational procedures of CALIS.

1.1.1.8 Database Documentation

The Bidder must agree, in its proposal, to provide CALIS Database Documentation that outlines, in detail, the physical data model, data elements, platform specific Data Definition Language (DDL) and logical models are documented and published. These include both informational and navigational meta data. This information provides RIDE ONIS application developer and database administrator support staff any relevant details necessary for maintaining CALIS. It also provides a common foundation of knowledge on which customers can communicate with the technical support team regarding proposed enhancements and improved functionality.

1.1.2 Project Schedule

Please Refer to Project Schedule in Section 3.2.

1.2 Project Deliverables

1.2.1 ABE CENTER SYSTEM ANALYSIS

A report of the current software and capability of each ABE Center in the state and how they gather, process, and report the data in the core collections.

1.2.2 MODEL STATEWIDE EDUCATION SYSTEM DESIGN

A description of what a statewide education data system would look like and how it would operate. The description should include high level data flow patterns and the boundaries between the various jurisdictions.

1.2.3 TECHNICAL TRAINING / KNOWLEDGE TRANSFER

Provide technical training for CALIS. RIDE and ABE Center personnel, as appropriate, will be assigned for CALIS user and technical training. This training and knowledge transfer shall enable RIDE and ABE Center personnel to be self-sufficient managers of CALIS upon completion of the project.

1.2.4 IMPLEMENTATION PLAN

A plan for implementing the statewide data system in the RIDE and for each ABE Center. The plan should include required hardware, software, development, etc. that may need to be purchased. It should include training needed, personnel qualifications, and implementation timelines.

1.2.5 SYSTEM OPERATION PLAN

A plan for how the operation of CALIS would be governed and an initial set of operational policies and procedures.

1.2.6 DOCUMENTATION

The Bidder must agree, in its proposal, to provide technical and user documentation CALIS.

1.2.7 ONGOING SUPPORT PLAN

The Bidder must agree, in its proposal, to provide ongoing support for CALIS.

1.2.8 SCHEDULED REPORTING

1.2.8.1 Bi-weekly project updates

The awarded Bidder must participate in weekly onsite project status meetings to update RIDE and the RIDE ABE management team on progress.

1.3 Implementation Schedule

Please refer Appendix A: Budget Form 3 for the implementation schedule for each project Phase.

1.4 Systems Software Environment

1.4.1 SYSTEMS SOFTWARE

The Bidder must propose an application software solution that operates, minimally, in a Microsoft Windows Server 2003 systems software environment.

1.4.2 DATABASE MANAGEMENT SYSTEM SOFTWARE

The Bidder must propose a solution that uses, minimally, Microsoft SQL Server 2000 as its DBMS. It is desirable that the Bidder's proposed solution uses Microsoft SQL Server 2005 as its DBMS.

1.4.3 APPLICATION DEVELOPMENT SOFTWARE ENVIRONMENT

1.4.3.1 Technology

The Bidder must specify, in its Technical Proposal, the technology that it will employ to perform the high level tasks during the CALIS project specified in Appendix A: Budget Form 3.

1.4.4 WEB SERVICES

It is desirable that the Bidder's solution includes the use, where applicable, of Web Services as an architectural framework. RIDE's Web services are available for Web users or other Web-connected programs from RIDE's server farm. RIDE's web services exploit the existence of the Internet and the World Wide Web, recognizing that every Web user has a browser that serves as a ready-made user interface to services, no matter where they are physically located. RIDE has created a web services framework that has the ability to create such services easily and then make it possible for potential users to find and use the services. RIDE's Web Services framework supports Web-based standards that enables applications to easily put their services on the Web and enable people to find them.

1.5 Systems Hardware Environment

It is desirable that the Bidder, in its proposal, make recommendations, based on its experience, regarding the typical and optimal configurations / capacity(s) of the hardware infrastructure environment required to support its proposed solution.

1.5.1 Web Server(s)

The Bidder must propose an application software solution that operates, minimally, on Dell Servers with 2gb of memory and dual 3ghz processors.

1.5.2 Database Server(s)

The Bidder must propose an application software solution that uses RIDE's Dell CX300 Storage Area Network environment as its storage repository.

1.5.3 Networking

The Bidder must propose an application software solution that operates in RIDE's WAN and LAN networking environment.

1.5.4 CALIS Functional Requirements

The Bidder must provide evidence that it has proposed an application software solution that meets, but is not limited to, the following functional requirements. The Bidder must provide this evidence by including user or system documentation, marketing literature, sample reports, a demonstration CD of the proposed solution, and/or web form snapshots in its proposal.

1.5.4.1 Web-based Application Software Solution

The Bidder must propose an application software solution is web-based.

1.5.4.2 Microsoft .Net Frameworks and Internet Development Environment (IDE)

It is desirable that the Bidder's application software solution operates under the Microsoft .Net framework and is developed using the Microsoft Visual Studio .Net framework.

1.5.4.3 Multi-Dimensional Security

- The Bidder's proposed application software solution in response to this RFP must support multi-tiered user authentication and permissions;
- The Bidder's proposed application software solution in response to this RFP must include a permission infrastructure that is granular, allowing administrators to set specific permissions for individual users;
- The Bidder's proposed application software solution in response to this RFP must manage user permissions by creating roles and assigning functions to those roles in the system. Multiple roles may be assigned to the same user;
- The Bidder's proposed application software solution in response to this RFP must allow users with administrative privileges to create other users in the system and assign permissions to those users;
- The Bidder's proposed application software solution in response to this RFP must allow users with administrative privileges to deactivate users under their authority;
- The Bidder's proposed application software solution in response to this RFP must provide users with a list of students, classes, staff or programs under their authority, based on log-in;
- The Bidder's proposed application software solution in response to this RFP must allow all users with appropriate permissions to review student data, including demographic information, test history, attendance history and outcomes;
- The Bidder's proposed application software solution in response to this RFP must allow administrators to create programs and classes within that program
- The Bidder's proposed application software solution in response to this RFP must allow users with administrative privileges to assign users to specific programs or classes;
- The Bidder's proposed application software solution in response to this RFP must allow users with appropriate permissions to register students in the system and assign them to classes;
- The Bidder's proposed application software solution in response to this RFP must enable users with the appropriate permissions have the ability to separate students from the program;

1.5.4.4 Reporting

- The Bidder's proposed application software solution in response to this RFP must alert users if their teaching certification needs to be updated;
- The Bidder's proposed application software solution in response to this RFP must allow data to be entered at the teacher, system or state level;
- The Bidder's proposed application software solution in response to this RFP must publish state-wide, system-wide, individual class or individual student reports;

*Rhode Island Department of Elementary and Secondary Education
Comprehensive Adult Literacy Information System (CALIS)
Request for Proposal: Appendix B*

- The Bidder's proposed application software solution in response to this RFP must meet all requirements for the National Reporting System for Adult Education and P.L. 105-220, the Workforce Investment Act of 1998 and be consistent with the U.S. Department of Education and the U.S. Department of Labor
- The Bidder's proposed application software solution in response to this RFP must generate all federal table reports required by the National Reporting System
- The Bidder's proposed application software solution in response to this RFP must insure that all federal table data reports adhere specifically to National Reporting System requirements
- The Bidder's proposed application software solution in response to this RFP must enable reports to be generated for any period of time in which student data was entered
- The Bidder's proposed application software solution in response to this RFP must allow the generation of reports which include only students who meet all attendance requirements for reporting or all students regardless of minimum attendance requirements
- The Bidder's proposed application software solution in response to this RFP must provide a combination of filtering factors in the production of reports;
- The Bidder's proposed application software solution in response to this RFP must enable reports to be generated for any period of time in which student data was entered;
- The Bidder's proposed application software solution in response to this RFP must allow the generation of reports which include only students who meet all attendance requirements for reporting or all students regardless of minimum attendance requirements;
- The Bidder's proposed application software solution in response to this RFP must enable reports to be generated for any period of time in which student data was entered
- The Bidder's proposed application software solution in response to this RFP must allow the generation of reports which include only students who meet all attendance requirements for reporting or all students regardless of minimum attendance requirements;
- The Bidder's proposed application software solution in response to this RFP must assure that all federal and local reports reflect most recent data;
- The Bidder's proposed application software solution in response to this RFP must assure that data is instantly accessible for reporting purposes;
- The Bidder's proposed application software solution in response to this RFP must provide 24/7 access to data, data entry and reporting functionality;
- The Bidder's proposed application software solution in response to this RFP must generate a listing of scheduled class meeting times;
- The Bidder's proposed application software solution in response to this RFP must provide a student-level at-a-glance review showing student demographics, attendance history, assessment history and goals;
- The Bidder's proposed application software solution in response to this RFP must generate a daily call log detailing outcome entries. Call log is archived and retrievable by outcome, date or date range;

1.5.4.5 Messaging

- The Bidder's proposed application software solution in response to this RFP must include an integrated messaging system allowing users with appropriate permissions to send messages to individuals or systems under their scope of management;

- The Bidder's proposed application software solution in response to this RFP must provide a messaging system that archives all messages, allowing users to activate, edit and deactivate messages;

1.5.4.6 Assessment

- The Bidder's proposed application software solution in response to this RFP must automatically generate educational functioning levels for students based on student assessments entered in the system;
- The Bidder's proposed application software solution in response to this RFP must allow users with appropriate permissions to enter student demographic data, assessment scores, class hours and relevant outcomes;
- The Bidder's proposed application software solution in response to this RFP must generate a list of improvement requirements on a class-by-class and an individual student basis, showing what scoring assessments or attendance hours are required to advance a functioning level for Table 4 purposes
- The Bidder's proposed application software solution in response to this RFP must require students to take alternating forms of the same assessment
- The Bidder's proposed application software solution in response to this RFP must validate scoring ranges and will not allow data to be entered that violates the scoring matrix;
- The Bidder's proposed application software solution in response to this RFP must provides a class-level at-a-glance review showing student improvement requirements and class attendance history for all students enrolled in a particular class;
- The Bidder's proposed application software solution in response to this RFP must include an extensive survey system for collecting and reporting outcomes;

1.5.4.7 Browsing and Searching

- The Bidder's proposed application software solution in response to this RFP must allow users to search for students by SSN, EIN or last name and birth date;
- The Bidder's proposed application software solution in response to this RFP must allow users to browse for students on a class-by-class basis;

1.5.4.8 Validation

- The Bidder's proposed application software solution in response to this RFP must generate a system-specific EIN for students who do not have a SSN, based on an algorithm determined by the client
- The Bidder's proposed application software solution in response to this RFP must validate all data entry dates
- The Bidder's proposed application software solution in response to this RFP must allow class and instructor hours to be entered on a daily, weekly or monthly basis
- The Bidder's proposed application software solution in response to this RFP must provide administrators with on-line tools to track student attendance and class hours
- The Bidder's proposed application software solution in response to this RFP must generate an alert for system administrators when a student has exceeded a client-determined number of hours of class time without having an assessment entered
- The Bidder's proposed application software solution in response to this RFP must alert system administrators when a student has not attended class after a client-specified number of days
- The Bidder's proposed application software solution in response to this RFP must alert system administrators when a student is registered in the system, but not assigned to a class;
- The Bidder's proposed application software solution in response to this RFP must alert users if a student is required to be notified of his selective service obligation;

*Rhode Island Department of Elementary and Secondary Education
Comprehensive Adult Literacy Information System (CALIS)
Request for Proposal: Appendix B*

- The Bidder's proposed application software solution in response to this RFP must not allow students to be separated so long as there is unapproved data or class assignments related to that student;
- The Bidder's proposed application software solution in response to this RFP must provide an outcomes at-a-glance review, showing students for whom outcome information has been entered as well as students for whom outcome information remains to be entered
- The Bidder's proposed application software solution in response to this RFP must permit users with appropriate permissions to manage database tables, including but not limited to types of assessments, scoring ranges, core indicators, class funding, class designation and assorted other data sets as determined by the client
- The Bidder's proposed application software solution in response to this RFP must be fully operational and implemented in a state at the time of bid;
- The Bidder's proposed application software solution in response to this RFP must include comprehensive online/real time help section;
- It is desirable that the Bidder, in its proposal, agrees to provide online training courses, when and where applicable.

1.5.5 CALIS Data Requirements

The Bidder, in its proposal, must agree to implement, in Phase 1, an adult literacy information system software solution that meets the following data requirements (Table 1) and system functions (Table 2) and to be able to apply the processing rules, as specified (Table 3).

Table 1. Data requirements (Phase I).

TOPIC	MEASURES	CATEGORIES Or DEFINITIONS
Core Outcome Measures		
Educational Gains	❖ Educational gains	❖ Educational functioning levels in reading, writing, speaking and listening and functional areas.
Follow-up Measures	❖ Entered employment	❖ Learners who obtain a job by the end of the first quarter after exit quarter
	❖ Retained employment	❖ Learners who remain employed in the third quarter after program exit
	❖ Receipt of secondary school diploma or GED	❖ Learners who obtain a GED, secondary school diploma or recognized equivalent
	❖ Placement in postsecondary education or training	❖ Learners enrolling in a postsecondary educational or occupational skills program building on prior service or training received

*Rhode Island Department of Elementary and Secondary Education
Comprehensive Adult Literacy Information System (CALIS)
Request for Proposal: Appendix B*

Table 1. Data requirements (Phase I).

TOPIC	MEASURES	CATEGORIES Or DEFINITIONS
Core Descriptive and Participation Measures		
Demographics	Ethnicity	American Indian or Alaskan Native, Asian, Native Hawaiian or Pacific Islander, Black or African American (non-Hispanic), Hispanic or Latino, White (non-Hispanic)
	Gender	Male, female
	Age	Date of birth
Status and Goals	Labor force status	Employed, not employed, not in labor force
	Public assistance	Receiving or not receiving assistance
	Rural residency	Rural, not rural
	Disability status	Disabled, not disabled
	Learner main and secondary reasons or goals for attending	Obtain a job, retain current job, earn a secondary school diploma or GED, enter post-secondary education or training, improve basic literacy skills, improve English language skills, citizenship, work-based project learner goal, other personal goal

*Rhode Island Department of Elementary and Secondary Education
Comprehensive Adult Literacy Information System (CALIS)
Request for Proposal: Appendix B*

Table 1. Data requirements (Phase I).

TOPIC	MEASURES	CATEGORIES Or DEFINITIONS
Student Participation	Contact hours	Number of hours of instructional activity
	Program enrollment	ABE, ESL, ASE, family literacy, workplace program, homeless program, correctional facilities, community corrections programs, other institutional program

Secondary Outcome and Student Status Measures (Optional)

Employment	Reduction in receipt of public assistance	Students whose TANF or equivalent public assistance grant is reduced or eliminated due to employment
Work-based Project Learner Achievement	Met work-based project learner goal	Achieved skills for work-based project learner activity (activity of at least 12 hours and no more than 30 hours of instruction to teach specific workplace skill)
Community	Achieved citizenship skills	Achieve the skills needed to pass the citizenship exam
	Voting behavior	Learner registers to vote or votes for the first time
	General involvement in community activities	Learner increases involvement in community activities
Family	Involvement in children's education	Learner increases help given for children's school work, contact with teachers to discuss education, and involvement in children's school
	Involvement in children's literacy-related activities	Learner increases the amount read to children, visits libraries, or purchases books or magazines for children
Student Status	Low income status	Low income, not low income
	Displaced homemaker	Displaced homemaker, not displaced homemaker
	Single parent status	Single parent, not single parent

*Rhode Island Department of Elementary and Secondary Education
Comprehensive Adult Literacy Information System (CALIS)
Request for Proposal: Appendix B*

Table 1. Data requirements (Phase I).

TOPIC	MEASURES	CATEGORIES Or DEFINITIONS
	Dislocated worker	Dislocated worker, not dislocated worker
	Learning disable adult	Learning disable, not learning disabled

Table 2. Basic data system functions required for Phase I.

PROGRAM/SITE FUNCTIONS	DESCRIPTION
Add Program (Agency)	Set up information for program (agency)
Add Grant Award	Set up information for grant award
Add Site	Set up information for instructional site(s) associated with program
Add Class	Set up information for class associated with site(s)
Move Sites/Classes	Ability to move one or more classes to a different site or sites to a different program (merge)
Class Attendance	Enter attendance information for all students in class
STUDENT FUNCTIONS	
Intake	Enter demographics, needs, goals, etc., on intake
Enrollment	Enroll/drop student in class
Attendance	Maintain attendance information for student
Assessment	Enter student test scores
Leveling	Level student based upon test scores (automatic)
Separation	Enter separation information
STAFF FUNCTIONS	
Staff Profile	Maintain information about staff members
Contact Hours	Enter actual contact hours by day, week, or month
REPORTING FUNCTIONS	
NRS Tables	Generate NRS tables including revisions re: requirements for State FY2006 and FY2007 (federals years 2005 and 2006). For table formats and instructions go to: http://nrsw.org
Attendance reports	Generate attendance reports/sheets
Report for follow-up	Generate report listing who needs follow up with contact information and follow-up script
Flat file output	Electronic flat file
SYSTEM MANAGEMENT FUNCTIONS	
Assessment/Leveling Information	Maintain information about test scores and levels
Goals/Achievements	Maintain information about standardized goals/achievements

Table 3. Basic data processing rules required for Phase I.

<u>Processing Rules</u>	<u>Description</u>
Rule 1	Students must attend 12 hours before being counted in NRS reports
Rule 2	Students have completed intake before enrolling
Rule 3	Students must be 16 years of age or older
Rule 4	Instructors who have obtained a college degree must be identifiable
Rule 5	Only one (lead) instructor per class but ability to identify others
Rule 6	Hours between pre- and post-test must be at least 75 hours
Rule 7	Post-test or post-test form must be appropriate test or form to allow for pre/post-comparison
Rule 8	Students must be pre-tested
Rule 9	Employment retention cannot be checked before 9 months past separation (or according to most recent NRS timetable guidance)

1.6 Project Planning

1.6.1 PROJECT MANAGEMENT REQUIREMENTS

Project Plan: The Bidder must include, in its proposal, a WorkPlan that contains the major tasks and associated deliverables specified in Section 1.1.4. Upon completion of the Discovery phase of the project, the Bidder must agree to review this workplan and the schedule of major deliverables with RIDE and to subsequently prepare, submit, and maintain a comprehensive detailed project plan based on an mutually agreed upon schedule of major deliverables. This plan must incorporate all tasks, milestones and deliverables that the Bidder or its sub-awarded Bidders will undertake through end of the project. The plan must also include tasks that specify RIDE's level of effort. The Project plan will be approved by the RIDE and will serve as binding document throughout the project.

Project Management Software: The Bidder must agree to use Microsoft Project 2003 Project Management software to manage this project. The software and all relevant files must reside on a RIDE server and be simultaneously published to the RIDE and State Information Technology Office Project Management Server. The Bidder must agree to provide the RIDE Director of Information Technology ("CIO") and other key RIDE employees with copies of the software and access to the project management files.

1.7 Project Status Tracking & Reporting

Weekly Reports: The Bidder must agree that, throughout each project, the Bidder's Onsite Project Lead and other key personnel **must** attend at least weekly meetings with the RIDE CIO, and the RIDE project team, as applicable. A written status report **must** be provided by the Bidder's Onsite Project Lead prior to each weekly meeting. These status reports must

describe all activities that occurred since the last report, including: whether deadlines were met, any problems that will have arisen that need to be addressed before proceeding to the next task, and anticipated tasks to be completed in the next week.

The Bidder's proposed format and level of detail for the status report will be subject to RIDE approval. These at least weekly meetings **must** follow a preset agenda developed by RIDE's CALIS Oversight Manager and the Bidder's Onsite Project Lead, but must also allow the Bidder's Onsite Project Lead and/or RIDE to discuss other issues that concern the project.

Monthly Reports: The Bidder must agree that, for each active application project, the Bidder's Onsite Project Lead **must** submit a written status report which is due to the RIDE CIO by the fifth working day following the end of each month during which the contract is in effect. The narrative portion of the report **must** include, at a minimum, the following:

- overall completion status of the project in terms of the approved detailed project work plan;
- plans for activities for the next month;
- deliverable status, with percentage of completion and time ahead or behind schedule for particular tasks;
- problems encountered and proposed/actual resolutions;
- any perceived changes in scope;
- testing status and test results;
- proposed changes to the detailed project work plan, if any; and
- a complete set of updated and current output from the project management software, along with a copy of the corresponding project plan files in electronic format.

1.8 User Training

The Bidder must provide a program of staff training and support for the implementation of CALIS. The Bidder must provide on-site, off-site, or customized training to RIDE personnel and administrative staff. This will include initial training, which will be provided as part of the standard installation procedure of any new components of RIDE CALIS application software.

The Bidder will present a plan that describes how it will provide initial training for the following staff groups:

- ABE Center Users: Persons assigned to the day-to-day operation of ABE Centers;
- RIDE IT Developers: RIDE technical staff assigned to create and maintain the RIDE CALIS application software and other RIDE applications that may need to inter-operate within the RIDE CALIS application software.
- Network Managers: RIDE technical staff assigned to support and manage the communications network across the various systems. Training will be in communications protocols, problem identification and diagnosis, traffic evaluation and network analysis.

All training materials for the proposed RIDE CALIS application software must be provided to RIDE in both printed and in machine-readable formats such as HTML or PDF formats. The Bidder must also provide continuous training for the RIDE CALIS application software due to RIDE staff

turnover and normal changes to the Department's business requirements. The Bidder must include a rate schedule for this continuous training

The Bidder will incorporate all of following training strategies into the design of their proposed end user training materials. The training program will be designed so that the Trainers can use a variety of presentation styles, including lectures, class participation, sample exercises, and hands-on training. The training materials for each training module will be designed to include handouts, which can be referred to as refresher materials after the training program is completed.

1.9 Training Plan

The Bidder will develop and submit a training plan for each application developed as a result of this RFP at least 30 days in advance of the initial training sessions, addressing all of the following:

- an identification of courses and a description of course content required to train each level of RIDE end users;
- a schedule for providing user training that trains all users within 20 days or less of actual implementation of each application;
- a description of the format and content of all material to be developed by the Bidder.

The Bidder will also develop an evaluation mechanism to determine whether training has successfully prepared RIDE staff to effectively use the proposed RIDE CALIS application software. This tool will be used to identify weaknesses of the training materials, curriculum, and presentations and specific revisions that need to be made.

1.10 Mandatory Requirements and Responses

A response to all questions listed below is mandatory when the words "the Bidder must" or the Bidder "will" are used in a requirements statement unless it is explicitly marked as desirable by the words "it is desirable". The term "desirable" is used to indicate that a specification, action, qualification or feature is not mandatory. Responses will not be disqualified solely for failure to comply with a desirable/optional requirement or specification, but may be disqualified if not in compliance with all mandatory requirements. Bidders must provide a succinct narrative when responding to each requirement stated in this RFP.

Bidders are cautioned that a statement similar to "The proposed system complies with the specification" will be considered too general and non-responsive and may result in the rejection of the entire proposal as non-responsive. The bidder response must demonstrate that the Bidder has a good grasp of the requirements, and that the proposed solution meets the requirements.

Desirable specifications are identified by the word "desirable". Bidders responses will be evaluated based upon responses to desirable specifications. Bidders who agree to meet all mandatory specifications (or who propose alternatives to mandatory specifications that are acceptable to the Selection Committee) and whose responses are judged with the **best** value based upon responses to mandatory, desirable, and any and all other factors in the evaluation criteria shall be eligible for award.

Documentation from existing products, e.g. excerpts from a user's guide, demonstrating the understanding of a particular requirement will help illustrate the points being made, and should be submitted and referenced by document and page number, in support of the requirement. If

detailed, summarize and refer to the attached software administration or user manual that is being submitted for over-all review. Specific page references are required.

If the Bidder's solution does not support a function or task, explain what modifications must be made to accommodate the function or task. If in the opinion of the Bidder, the function or task is not feasible or in the best interest of RIDE, describe why it is not feasible and identify alternative options, implications and risks.

1.11 Project Funding Considerations

Due to possible federal funding constraints, Bidders' cost proposals should consider each phase of the project as a separate project. Bidders must in their Technical and Cost proposals demonstrate an understanding that the functionality specified in this RFP for each project phase must be implemented in a manner such that it will operate whether or not the subsequent phase(s) are funded.

1.12 Disclosure

In a separate procurement, RIDE has retained the services of a Project Consultant (Integre International Inc.) to provide CALIS project oversight by assisting the Department in monitoring the implementation phases of the CALIS project, to assist the Department in developing system and data standards and requirements for RIDE CALIS application software components and to review the awarded Bidder business and technical proposals to ensure that the all features and components vendor's proposals are delivered and implemented.

In addition, Integre has assisted in the preparation of this RFP and will assist in the competitive procurement process, offering technical support in preparing responses to Bidder inquiries, and for independent input and assistance during the proposal evaluation. Although this expertise is being offered to RIDE during proposal evaluation, Integre does not serve as a voting member on the Selection Committee nor do any its recommendation(s) serve as the basis for selection.

Due to its participation in planning and in the activities related to this RFP, Integre is prohibited from bidding as a prime bidder or as a sub awarded Bidder for the services solicited under this RFP. This disclosure is provided for informational purposes only. Our intent is to clarify the role of Integre in the procurement process and to underscore RIDE's commitment to conducting an open and competitive procurement process.