

**HAWTHORN ACADEMY
REQUEST FOR PROPOSALS**

IT SERVICES PROVIDER

**SECTION I
SELECTION SCHEDULE**

Advertisement: This Request for Proposal will be published on Hawthorn Academy’s website (www.hawthornacademy.org) from March 17, 2023 to April 21, 2023.

Submission of Proposals: Proposals will be accepted until 5:00 p.m. April 21, 2023.

Proposal Opening: Proposals will be opened publicly at 9:00 a.m., April 24, 2023, at Hawthorn Academy’s South Jordan Campus located at 1437 West 11400 South, South Jordan, Utah 84095.

Review of Submitted Proposals: Approximately April 24, 2023 through May 10, 2023.

Tentative Award Date: Approximately May 10, 2023.

Offeror to Provide Equipment and Services: June 1, 2023.

**SECTION II
INTRODUCTION**

- A. Hawthorn Academy (“HA” or the “school”) is a Utah charter school with campuses located in South Jordan and West Jordan. HA serves students in grades K-9 with a total enrollment of over 1,300 students.
- B. HA is currently requesting proposals for IT services and associated computer equipment as described below.
- C. **AWARD OF CONTRACT.** The contract will be awarded to the offeror whose proposal is determined to be the most advantageous to the school, taking into consideration evaluation factors set forth in the RFP. No other factors or criteria will be used in the evaluation. The final determination shall be in writing. The contract file will contain the basis on which the award is made. The school can reject any and all proposals, and it can waive any informality or technicality in any proposal received if it determines it would serve the best interests of the school. The school will open proposals publicly, identifying only the names of the offerors. Following the award decision, all offerors will be notified and all proposals become public information.
- D. **PROTECTED INFORMATION.** If the proposal contains any trade secrets, commercial information or non-individual financial information that the offeror does not wish to become public, the offeror must submit a Claim of Business Confidentiality with the

proposal. The Claim of Business Confidentiality must include a concise statement of reasons supporting the claim of business confidentiality (Utah Code § 63G-2-309(1)). The offeror must also submit one a “redacted” (excluding protected information) copy of the response, which should be clearly marked “Redacted Version.” Pricing and service elements may not be protected.

SECTION III **PROPOSAL INFORMATION**

- A. Proposals must be submitted in compliance with **Section IV** of this RFP.
- B. The goods and services required and offered in a proposal should meet the needs described below. Only one proposal may be submitted and considered per offeror. Offerors may include any special or unique services they plan to provide.
- C. Submission of a proposal will be construed to mean that the offeror understands the requirements contained herein, and the offeror can supply the described services.
- D. Proposals will be opened publicly at **9:00 a.m. on April 24, 2023**, at Hawthorn Academy’s South Jordan Campus. Proposals will be opened so as to avoid disclosure of contents to competing offerors during the process of negotiation. However, a register of proposals will be prepared and shall be open for public inspection after the contract is awarded. The school will cooperate with all potential offerors, to the extent reasonably possible, in their attempt to obtain information. Discussions may be conducted with offerors who submit proposals for the purpose of assuring full understanding of, and responsiveness to, the solicitation requirements.
- E. Selection of the successful offeror will form a contract pursuant to which the successful offeror must honor for the school the prices for the equipment and services along with the other terms and conditions outlined in the successful proposal. All pricing and other terms must be honored for at least eighteen (18) months following award of the contract. Therefore, if selected, the successful offeror must be prepared to execute an agreement with the school pursuant to which it will provide the services and equipment on the terms and conditions outlined in the successful proposal. The successful offeror must be willing to enter into an agreement with the school in substantially the form set forth in the Sample Service Agreement provided with this RFP.
- F. **It is understood that the school reserves the right to accept or reject any or all proposals and/or to waive any or all formalities in any proposal or in the proposal process deemed to be in the best interests of the school. No agreement exists on the part of HA until a contract is approved and executed by the school’s Board of Directors.**
- G. Proposals received by any unapproved form are not acceptable and will not be considered.

- H. All inquiries, questions or requests for clarification must be submitted via email to Kim Oliver at koliver@hawthornacademy.org and received prior to **5:00 p.m. on April 21, 2023**.
- I. This RFP does not obligate the school to pay for any costs of any kind whatsoever that may be incurred by an offeror/respondent or any third parties in connection with a response proposal. All responses and supporting documentation shall become property of the school. Further, the school shall not be liable to any offeror, person, or entity for any losses, expenses, costs, claims or damages of any kind arising out of, by reason of, or attributable to, the offeror responding to this RFP.
- J. Acceptance of an offer by the school does not obligate the school to enter into a contract with or purchase any item from the offeror, and no agreement to purchase will exist on the part of the school until an agreement is properly approved by the school's board of directors.

SECTION IV **PROPOSAL REQUIREMENTS**

Potential offerors are hereby invited to submit a proposal for IT services.

It is mandatory that each proposal contain a cover letter which includes the following:

A statement of the offeror's intent to provide the services outlined in the proposal;
The complete company name and address;
Company contact person's name, phone number, and email address;
Company's website, if applicable;
The signature of the company's authorized representative, including position/title; and
The date of submission.

Proposals must be emailed to Kim Oliver at koliver@hawthornacademy.org in PDF format.

ALL COST INFORMATION PROVIDED BY THE OFFEROR MUST BE SUBMITTED IN A SEPARATE DOCUMENT AND A SEPARATE ELECTRONIC FILE AND CLEARLY IDENTIFIED AS COST INFORMATION. NO COST INFORMATION MAY BE SUBMITTED WITH THE REST OF THE PROPOSAL.

The email message submitting the proposal must have a subject line reading "PROPOSAL FOR IT SERVICES" and be submitted on or before **April 21, 2023 by 5:00 p.m.**

Proposals received after this date and time will not be considered.

Proposals must be signed by the offeror.

SECTION V
PROPOSAL SPECIFICATIONS

- A) The IT Services Provider will be expected to act as an independent contractor in the delivery of the described services to the school.
- B) HA is seeking to enter into a Service Agreement with the IT Services Provider for comprehensive IT support services, including creation of a long term technology plan for the school, maintenance and periodic updating of the school's network architecture, and procurement of necessary equipment, as requested by the school. The successful proposal must satisfy the requirements set forth herein. Each offeror must provide a response in their proposal, in narrative format, to each of the following components.
- 1) *Qualifications and References.* Each offeror must provide the following information:
- a) A brief outline of the company and services offered, including number of years in business, number of years the offeror has provided services to Utah charter schools, number of people currently employed.
 - b) Provide a narrative demonstrating experience and a track record for providing IT services to Utah charter schools or otherwise provide evidence demonstrating your ability to provide services to the school. Preference may be given to offerors who demonstrate a successful operating history, especially a history that includes providing services to Utah charter schools that are current clients.
 - c) Provide an outline of products offered and/or supported.
 - d) Provide information on current clients, including total number of clients and a list of current clients that are Utah charter schools.
 - e) Include a list of references that the school may contact to discuss your past performance and evaluate your ability to perform the required services.
 - f) Provide information about the qualifications of your personnel. Technical staff assigned to work for a member school must have the following credentials:
 - (i) Current licenses or certificates demonstrating their competency to perform the required duties.
 - (ii) Abilities and aptitudes to troubleshoot the network, computer, telecommunications, software, and hardware systems as needed, and to provide school personnel with appropriate counsel as often as required.
- 2) *Scope of Work, Specifications, and Requirements*

- a) Please describe your expertise, ability, and proposed plan to work with the school to develop a comprehensive technology plan that efficiently implements available technology to meet the school's needs in a cost effective manner. In addition, please provide a specific response to the following:
 - (i) Provide any specific recommendations you have regarding the school's technology plan, including a rationale as to how those recommendations would improve the school's technology plan and benefit the school and its students.
 - (ii) Explain how you would properly implement the school's technology plan and provide associated maintenance and support. Please include how you would advise and assist the school in ensuring adequate connectivity to satisfy demands of the technology plan and otherwise meet the school's needs.
- b) Describe your experience with configuring a core network capable of satisfying the demands of the school's technology plan. Describe the proper industry standards that apply to said configuration, including: physical and virtual configurations, industry standard backup systems, ongoing management and support of network resources, and industry standard seamless wireless connection throughout building. Please provide your definition of "proper industry standards" for this application in sufficient detail to allow comparison with the approach of other offerors.
- c) Email System. Describe how you would support the school as necessary to select, update, and maintain an email system that is scalable, secure, auditable, and possesses necessary retention capabilities.
- d) Internet Filtering. Please explain your understanding of the school's legal and ethical obligations to filter content pursuant to applicable laws including CIPA. Please describe your ability to audit, report, and identify an individual device and its user. In your response, please include:
 - (i) Whether, and to what extent, these capabilities extend to school devices both within and outside the school facility; and
 - (ii) Whether or not you recommend the use of multiple filtering techniques and identify said technique(s).
- e) Student Information System. Describe your ability, experience, and approach to configuring and supporting student information systems as needed.
- f) Phone Service. Describe your experience and ability to assist in defining specifications for phone services and to interface with telecommunications providers as required to implement system.

- g) End User Equipment Services.
- (i) Describe your expertise and proposed approach to deploy, inventory, and maintain all user hardware in a timely and cost-effective manner.
 - (ii) Give an example of a standardized configuration to accommodate all computer platforms, user settings and controls. Provide details/methods for future customized imaging and software deployment.
 - (iii) Explain your experience with the implementation of appropriate settings and controls of devices depending on their use (i.e., student versus faculty).
 - (iv) Indicate whether, and to what extent, you provide real-time monitoring of student computers while in use.
- h) Interactive Classroom Technology. Describe your experience and proposed approach related to advising and defining specifications for classroom technology, including configuration, deployment, and implementation of said technology.
- i) Standardized Testing. Describe your understanding of the technical and logistical needs and requirements associated with standardized testing in charter schools. In addition, identify potential technical problems/issues associated with administering these tests, and indicate what, if any, support you provide to ensure smooth testing experience and compliance with applicable requirements.
- j) Training and Professional Development. Identify *all* staff training you will provide as part of your proposal regarding the use of network resources you will provide, end-user hardware, and interactive classroom technology. In addition, describe your proposed approach to accommodating specific requests for staff training on routine work in order to reduce the cost of services.
- k) Comprehensive Equipment Procurement. Please indicate whether you have access to, and the ability to purchase from, a variety of equipment vendors and whether, and to what extent, you pass on the direct cost of the equipment to the school or markup the price of the equipment purchased through these vendors. Indicate whether you offer participation in a volume-buying program to reduce costs for the school and whether, and to what extent, you pass on the direct cost of the equipment to the school or markup the cost equipment purchased through this program.
- l) Describe your experience and ability to assist and advise the school in defining equipment specifications and analyzing technical requirements.
- m) Indicate whether you support the school's position that warranty rights associated with all purchased/leased equipment should reside with the school.

- n) Indicate to what extent the school administration or designated personnel will have access to all information technology systems, programs, and servers. The school's position is that it should have access to all such things upon request by the authorized person or designated personnel.
 - o) When engaged in planning and decision making with the administration and/or Board of Directors, describe your proposed approach to providing a range of alternatives, including analysis of relative costs and benefits of each alternative.
 - p) Describe your proposed approach to address the management and inventory of all school technology equipment and licenses.
 - q) Describe your proposed approach to providing management and administration of data and records, including your ability to assist the school in protecting confidential data stored on the school's network and devices and addressing all applicable student data privacy and security requirements under which the school must operate.
 - r) Describe your proposed approach to protecting against security breaches of the school's network, including your proposed approach for who would be responsible in the event of a security breach.
 - s) Describe your proposed procedures for responding to support requests from administration and staff, including any help desk system that you have in place for submission of service requests. If multiple steps are involved, please indicate who is responsible at each step and applicable timelines for responses, actions, and identify established follow up procedures if any.
 - t) Please identify any additional value-added services your company provides that would reduce expenses that the school would otherwise incur.
 - u) Indicate your hours of operation. Note: due to the nature of the services contemplated within this RFP, the school expects the successful offeror to provide service and support in a timely manner, both during regular business hours of approximately 8 am to 5 pm, Monday through Friday, as well as other times in order to address emergencies and other unforeseen problems that the school might encounter.
 - v) Indicate your willingness to enter into a service agreement in substantially the same form as the Sample Service Agreement provided with this RFP. Specify any provisions that you would not be willing to enter into as well as any proposed additional or alternative contractual provisions.
- 3) Budget and Estimated Pricing.

- a) **ALL COST INFORMATION MUST BE SUBMITTED IN A SEPARATE DOCUMENT AND A SEPARATE ELECTRONIC FILE THAT ARE CLEARLY LABELED. NO COST INFORMATION MAY BE INCLUDED WITH NON-COST PROPOSAL INFORMATION.**
- (i) All offerors must provide a cost breakdown for providing both campuses of the school with all necessary ongoing maintenance and support services for three (3) years. Offerors should specify what services are included in ongoing maintenance and support. Offerors are invited to provide both an hourly fee cost proposal and/or a fixed fee cost proposal (monthly and/or annual) for ongoing maintenance and support services.
 - (ii) All offerors must also provide a cost breakdown for providing both campuses of the school with all necessary core network products for three (3) years. Offerors should specify what core network products are included and provide the price of such products per year.
 - (iii) In order to provide a uniform basis on which the school may evaluate the cost of each proposal, evaluation of the cost element will also be based on the Sample Technology Plan, a copy of which has been included with this RFP.
 - (I) All offerors must complete the cost breakdown table in the Sample Technology Plan and provide bids for equipment meeting the specifications provided. Please provide specifications for the equipment being bid.
 - (II) *The Sample Technology Plan provided is merely a sample intended to allow the school to compare pricing on selected pieces of equipment.* By providing the Sample Technology Plan, the school does not represent that it will actually implement all or any of the elements contained therein and does not bind itself to any aspect of the plan with respect to an offeror selected to provide IT services.
- 4) Selection of the IT Service Provider will be based on the responses to the above-listed components in relation to the Evaluation Criteria set forth in the following section.

SECTION VI

SUBSTANTIVE EVALUATION CRITERIA

Note: Proposals that are not compliant with proposal specifications will not be considered.

Experience (25 points): This criterion is based on the overall depth and quality of the offeror's experience providing the required services to Utah charter schools as demonstrated in the proposal. An offeror's experience working with current clients who are Utah charter schools will be weighted more heavily.

Personnel Qualifications (5 points): This criterion is based on the demonstrated qualifications of the offeror's personnel.

Quality of References (10 points): This criterion is based on the information obtained

regarding the quality of the offeror's services from the references provided. Information obtained from references that are Utah charter schools currently working with the offeror will be weighted more heavily.

Scope of Services (25 points): This criterion is based on the offeror's demonstrated expertise and ability to provide the full scope of required services to Utah charter schools. This criterion includes the offeror's willingness to enter into a service agreement on substantially the terms proposed.

Responsiveness – Geographic Proximity, Remote Capabilities (5 points): This criterion is based on the offeror's geographic proximity to HA's schools and its ability to otherwise provide required services in a timely manner, such as through remote access capabilities.

NOTE: In accordance with Utah Code Ann. § 63G-6a-707, the evaluation committee will not know or have access to any information relating to the cost of a proposal until after it finalizes and submits its final scores on all of the criteria listed above.

Cost (30 Points): This criterion is based on the offeror's budget and estimated pricing for providing the ongoing maintenance and support services as well as the equipment set forth in the Sample Technology Plan. This includes the offeror's ability to provide a budget that is thorough, specific, and supports the Sample Technology Plan.

Total points available based on Evaluation Criteria: 100 points