

RECOMMENDED

Request for Information (RFI) and Request for Proposals (RFP) Language (North America)

Request for Information (RFI) Basic Components

Every institution goes about identifying, integrating and validating the use of educational technologies in their own way. One of the first steps is to frame, for both vendors and end users, the basics of the needs of the organization through the development and release of a Request for Information (RFI). The RFI is a more informal information gathering on both the vendor's capabilities and their thoughts on the proposed work ahead. They tend to be very short turn in nature and help you in the development of the more formal Request for Proposal (RFP). Schools/districts/states may or may not use this "framing" step to support their upcoming project but if used, RFI's look very different between institutions. Most include:

- Organizational Background – a snapshot of the institution asking for information
- Project Purpose and Goals – outlining the specifics on the use case(s) to be addressed and desired outcomes
- Responding Organizations Experience in Technical Standards Usage – this might mean in various data/transport standards such as SIF, IMS, PESC, Ed-Fi Model, etc.) or security standards (IEEE, NIST, ISO, etc.).
- Responding Organization's Experience and References – both to this specific use case and other customers in general

For "In Use" Examples of RFI wording you can use specific to SIF Unity, see Appendix A

Request for Proposals (RFP) Basic Components

As with RFI's, every institution goes about identifying, integrating and validating the use of educational technologies in their own way. A Request for Proposals (RFP) is developed to announce to companies to place bids to complete the project. This is the more formal process as the RFP outlines the bidding process, contract terms, and provides guidance on how the bid should be formatted and presented. Schools/districts/states may or may not use this "framing" step to support their upcoming project but if used, RFP's look very different between institutions. Most include:

- Project Scope
- Deliverables
 - Project Plan / Design and Architecture / User Acceptance Methodology
- Integration Plan
- Data Quality Assurance
- Validation
 - User Access / Training / Tech Support
- Costs and Delineation of Roles

For "In Use" Examples of RFP wording you can use specific to SIF Unity, see Appendix B

Appendix A

In Use Examples of SIF/Unity Request for Information (RFI) Questions by LEAs/SEAs

Standards Involvement

Please provide a brief history of your company's involvement with the Access 4 Learning Community (previous the SIF Association). In addition, please provide the following information:

- Please provide your original date of SIF/A4L membership and list any leadership positions held by staff in your organization in the A4L Community.
- Describe the functions(s) supported by your application(s) (i.e. subscriber, provider, etc.)
- Please list other agent vendors and/or SIF Certified Applications that are known to have been deployed by schools and/or districts that have implemented your SIF Certified Applications that will be provided as part of this proposal.
- Please list the SIF Unity Data Objects available in the SIF Certified Applications that will be provided as part of this proposal.
- List at least three reference schools and/or districts that have purchased and/or deployed your SIF Certified Application.

Note that a comprehensive confidential list of clients may be requested if your organization is chosen for further consideration.

SIF Unity Certification

Please list any SIF Certified applications that will be provided by your company as part of this proposal that (as posted on [SIF Certification Registry](#)).

- What version of the SIF Certification Program are your applications certified against?

Costs

- Are costs for your agent(s) included in the costs for your software or are they separate costs?
- Describe installation and ongoing support cost.
- Are upgrades included in software maintenance or annual service agreement?

Appendix B

In Use Examples of SIF RFP and Legislative Language

In Use Local Education Agency (LEA) SIF Unity RFP Example

The goal of the XXXXX project is the creation of a new XXXXX that supports the latest certified version of the SIF Specification (“Unity”) and which will allow for the integration of current data from multiple source systems into a single structure. The XXXXX project will perform all inter-system data transfers (with internal and external agencies) and application integration functions for (function);

The XXXXX must be certified to the SIF Unity Specification, or any updated versions of the specification, which enable school districts software management systems to communicate with each other. The XXXXX system shall include, but not be limited to, the specifications for (function 1), (function 2), and (function 3) formatting specifications.

In Use State Education Agency (SEA) SIF Unity RFP Example

To assist in the implementation of the state reporting systems required pursuant to XXXXX, the Department shall contract for the creation of, and implement, a state-wide data-sharing system that is based on the SIF Unity Specification. After the state-wide data-sharing system is implemented, each school district may, but is not required to, participate in the state-wide data-sharing system by using a data system that is certified with the SIF Association (dba Access 4 Learning (A4L) Community).

All technology systems used by the Department of Education and by local K-12 schools and districts shall be SIF Certified. Alternative systems may be used if the alternative system is compliant and all data sets required by the Department of Education are provided to the department in acceptable, real-time format. Schools and districts may use alternative compliant systems if an alternative system is needed because of cost, efficiency, or a need for additional software features.

In Use Policy SIF Legislative Language

Any state and/or federal funds utilized in the development and implementation of student record systems, local, regional and state educational entities shall construct systems to contain the following elements and comply with the following standards and compliance capabilities:

1. Utilize Extensible Mark-up Language (XML) and JavaScript Object Notation (JSON), which defines common data formats used during communication between disparate systems;
2. Certify to the SIF version Unity Specification, or any updated versions of the specification, which enable school district software management systems to communicate with each other; and
3. Utilize defined state data codes to ensure consistent reporting from school districts (i.e. course identifiers, teacher certification, etc.).

By the 20XX-20XX school year, any state or federally funded student information systems and any instructional management system used by school districts and the state shall comply with the Extensible Mark-up Language (XML), JavaScript Object Notation (JSON) standards and the SIF Unity Specification, or any updated versions of the specifications.