# RFP #21274 – Online Professional Development Management Solution

# Prioritized Requirements

### Prioritized Requirements by Function

Below is a table containing the prioritized requirements for each function. Please complete this

section of the Requirements Matrix in Appendix A. The criteria for prioritizing the requirements were:

* + (**S**) **Showstopper:** Requirement must be supported for legal, audit, or policy reasons.
  + (**H**) **High:** Affects business process greatly.
  + (**M**) **Medium:** Affects productivity, quality of service; significant value.
  + (**L**) **Low:** Requirement support would be "nice to have."

For each requirement listed in the Requirements Matrix provided below please respond with one of the following values in the Vendor Response column:

* + **3** indicates that this requirement is fully met by the current release of your packaged solution.
  + **2** indicates that this requirement is fully met by a planned release of your solution. A "2" response must be accompanied by the general availability date of the solution.
  + **1** indicates that customization to a packaged solution, or that custom developed software will be necessary to meet this requirement.
  + **0** indicates that your solution does not and is not planned to meet the requirement, either by new release or customization.

For any response of 0, 1, or 2, please describe the uncertainty or limitation related to the response.

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| **Function** | **Requirement** | **Priority** | **Vendor Response**  **(0, 1, 2, 3)** | **Describe Uncertainty or Limitation (for responses of 0, 1, 2)** |
| **Function 1: Set up and maintain portals** | Requirement 1.1: CMSD retains ownership of all CMSD data including but not limited to data entered by CMSD, imported from CMSD and/or its partners and/or derived using CMSD data. | H |  |  |
|  | Requirement 1.2: CMSD reserves the right to request any and/or all of its data at any time. | H |  |  |
|  | Requirement 1.3: The ability for the  System Administrator to set up users, if Active Directory is not possible. (District prefers Active Directory) | S |  |  |
|  | Requirement 1.4: The ability to create and maintain users automatically based upon given criteria and data from the Workday ERP system, if Active Directory is not possible. (District prefers Active Directory,) | S |  |  |
|  | Requirement 1.5: The ability for the  Professional Development solution and Workday to connect HR information with user, including:   * Job Code * Location * Contract type * Start date * Employee Number * License issue date * IPDP Approval date | S |  |  |
|  | Requirement 1.6: The ability to add  new schools in system | S |  |  |
|  | Requirement 1.7: The ability to  archive closed schools in system | S |  |  |
|  | Requirement 1.8: The ability to keep employee’s data even after the employee has left the district. (e.g., Retired/resigned | S |  |  |
|  | Requirement 1.9: The ability to  validate teachers to schools | S |  |  |
|  | Requirement 1.10: The ability to  identify a team or teams at each school | M |  |  |
|  | Requirement 1.11: The District seeks a hosted solution/ SaaS. | H |  |  |
|  | Requirement 1.12: Maintain integrity of historical data | S |  |  |
|  | Requirement 1.13: The ability for  the System Administrator to personalize an announcement in the solution | H |  |  |

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| **Function** | **Requirement** | **Priority** | **Vendor Response**  **(0, 1, 2, 3)** | **Describe Uncertainty or Limitation (for responses of 0, 1, 2)** |
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| **Function 2: Professional Development Scheduling and Enrollment** | Requirement 2.1: Ability to maintain courses and professional learning sessions and data for the entire district. | S |  |  |
|  | Requirement 2.2: Providers will record the following when proposing a course:   1. Course/Session Name 2. Instructor Name/Position 3. Location 4. Date and Time 5. Contact Hours 6. Type of Course (e.g., online) 7. Type of Credit 8. Course description 9. Funding source 10. Program (e.g. new teacher induction) 11. Target audience (teachers, counselors, etc.) 12. Grade level 13. Subject 14. Academic priorities 15. Maximum number of participants 16. District level or school/site based session | S |  |  |
|  | Requirement 2.3: The system administrators can assign the role of PD provider to multiple users. | S |  |  |
|  | Requirement 2.4: Providers should be able to propose professional learning activities as a single session or a class that meets multiple times. | S |  |  |
|  | Requirement 2.5: Allow provider to apply the correct function, grant, gift or title fund for fund reporting for paid sessions on the course proposal page for later submission to Compensation department | H |  |  |

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| **Function 3: Online Catalog:** | Requirement 3.1 Offer an online catalog of coursework for employee registration with self-service enrollment for end user | S |  |  |
|  | Requirement 3.2: Online printable Calendar of all PD events | H |  |  |
|  | Requirement 3.3: Ability to filter catalog by program, grade, job function/position, academic priority and perform searches | S |  |  |
|  | Requirement 3.4: Ability to group courses/values by program, school, topic, grade, job function/position | S |  |  |
|  | Requirement 3.5: Allow for single sign on the same as the District currently uses for Office 365 and Workday | M |  |  |
|  | Requirement 3.6: Allow District administrators to add, edit, and delete catalog events. Should have a copy feature with editing capability to recreate and update recurring events | H |  |  |
|  | Requirement 3.7: Allow District administrators the ability to set duration to take action (e.g. submitting attendance, completing session evaluation) | H |  |  |

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| **Function 4: Individual PD tracking** | Requirement 4.1: Allow employees to submit individual CEU eligible events/activities for approval. Upon approval, the predetermined amount of CEUs will be added to transcript (e.g. action research, external professional development, consistently high performing, etc.) | S |  |  |
|  | Requirement 4.2: Users can upload certificates of completion/attendance as part of tracking out-of- district activities. | S |  |  |
|  | Requirement 4.3: Import transcript data from current system and store multiple years of employee's data. | S |  |  |
|  | Requirement 4.5: Allow employee or administrator to select the appropriate district goal(s) to be met when requesting the event. | S |  |  |
|  | Requirement 4.6: Allow employee to view all years of his/her data stored in the database | H |  |  |
|  | Requirement 4.7: Provide an online transcript of employees training history | S |  |  |
|  | Requirement 4.8: Allow employee to select date range to view on his/her transcript | H |  |  |
|  | Requirement 4.9: Allow administrators to customize transcript with district message. | S |  |  |
|  | Requirement 4.10: Allow District administrator to input the license issue date and IPDP approval date. | M |  |  |
|  | Requirement 4.11: Import course completion data periodically from external vendor (e.g., Public Works) | S |  |  |

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| **Function 5: Compensation Processes** | Requirement 5.1: Allow for multiple budget codes to be added to each event in the catalog, or allow budget code(s) to be added at the time of the request, or during the approval process | H |  |  |
|  | Requirement 5.2: Allow for accuracy of facilitators and attendees and also allot for an approval process to ensure proper compensation (e.g. providing a custom validation statement for compensated sessions) | H |  |  |
|  | Requirement 5.3: Allow Compensation department representatives to pull verified attendance data records for sessions eligible for payment so that the compensation may be processed by the Compensation department. The compensation department will indicate when the participant will be paid via the portal. | H |  |  |
|  | Requirement 5.4: Notification to compensation department when sessions eligible for payment are proposed and when attendance is submitted | H |  |  |
|  | Requirement 5.5: Extract excel sheets and run reports regarding attendance to ensure proper payment | S |  |  |
|  | Requirement 5.6: Identify which sessions are eligible for additional compensation in including identifying the facilitators/providers of each session | S |  |  |

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| **Function 6: PD Event Management** | Requirement 6.1: Allow providers/facilitators opportunity to upload attachments for PD events (handouts, schedule, etc.) | H |  |  |
|  | Requirement 6.2: Maintain rosters electronic sign-in/attendance, certificates | H |  |  |
|  | Requirement 6.3: Generate printable sign in sheets with session title, date, and registrants’ names populated | H |  |  |
|  | Requirement 6.4: Manual override capability for automated features | S |  |  |
|  | Requirement 6.5: Ability to email registrants with class details; messages should go to registrants’ district email inbox | S |  |  |
|  | Requirement 6.6: Send reminder email to registrants. Course provider should be able to specify when reminder will go out | H |  |  |
|  | Requirement 6.7: Override feature to change event details (location, class size) with automated notification for all impacted by the change | S |  |  |
|  | Requirement 6.8: Allow system administrator to create events and submit/approve request for events that occurred in the past | S |  |  |
|  | Requirement 6.9: Ability to generate certificates of completion for courses | H |  |  |
|  | Requirement 6.10: Ability to launch system surveys/evaluations generated by attendance completion and analyze evaluations for professional development needs | S |  |  |
|  | Requirement 6.11 Ability for administrators to correct attendance after it has been submitted by facilitator. |  |  |  |

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| **Function 7: Registration and Attendance** | Function 7.1: Allow for multiple levels of approval for each employee request (e.g. principals approve attendance for district PD days) | M |  |  |
|  | Function 7.2: Allow emails from administrators to providers within the system for course related communication | H |  |  |
|  | Function 7.3: Include a “close by” date for catalog events. This is the date in advance of the class on which registration will close. | H |  |  |
|  | Function 7.4: Maintain wait list capabilities | S |  |  |
|  | Function 7.5: Allow for waitlisted individuals to be automatically enrolled if a space becomes available | H |  |  |
|  | Function 7.6: Email notification when automatically enrolled from wait list | H |  |  |
|  | Function 7.7: Simple attendance submission process (e.g. select all registrants and deselect those who did not attend; QR code sign in, etc.) | S |  |  |
|  | Function 7.8: When attendance is submitted, course and hours are displayed on attendee's transcript | S |  |  |
|  | Function 7.9: Ability to indicate the number of hours attended for the participants who did not stay for the entire sessions | S |  |  |
|  | Function 7.10: Allow a way for guests outside of the organization to register for designated sessions | S |  |  |
|  | Function 7.11: Providers should be able to add employees to course registration (in the event the employee has technical challenges, or the registration window has closed) | S |  |  |
|  | Function 7.12: Provider receives automatic email notification if attendance is not recorded in solution within predetermined time frame | H |  |  |
|  | Function 7.13: System administrators receive notifications if providers have not submitted attendance in determined time frame | S |  |  |
|  | Function 7.14: Principals have access to view attendance of their teachers for designated district professional development days | H |  |  |

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| **Function 8: Approval Routing Process** | Function 8.1: Customizable approval process for course proposals | S |  |  |
|  | Function 8.2: Restrict incomplete applications from continuing | S |  |  |
|  | Function 8.3: Customizable approval process for credit requests | S |  |  |
|  | Function 8.4: Allow a higher-level administrator to bypass a lower level approval when deemed necessary | S |  |  |
|  | Function 8.5: Include a time stamp on requests and approvals for tracking purposes | S |  |  |
|  | Function 8.6: Include mass approval, denial, and delete functionality | S |  |  |
|  | Function 8.7: Include undo process for erroneous approvals | S |  |  |

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| **Function 9: Reporting** | Function 9.1: Create reports based upon the following:   1. Funding source 2. Program (e.g. “new teacher induction”) 3. Grade Level 4. Content Area 5. Presenter 6. Department 7. Job Code/function 8. Site 9. Topic 10. Number of participants in a session by Network or by school | S |  |  |
|  | Function 9.2: Report evaluation trends by building, presenter, topic | S |  |  |
|  | Function 9.3: Ability to pull one user’s entire record | S |  |  |
|  | Function 9.4: Ability for solution to pull a random sample of evidence to quality control check | H |  |  |
|  | Function 9.5: Ability to provide snapshot reporting (as of MM/DD/YEAR) | H |  |  |
|  | Function 9.6: Ability for the solution to accommodate user dashboards specific to role/user type | S |  |  |
|  | Function 9.7: Ability to run attendance reports for specific dates (e.g. district professional development days) | S |  |  |

# Technical Requirements

A description of the Technical Requirements is below. Please complete this portion of the

Requirements Matrix

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| **Area** | **Requirement** | **Vendor Response**  **(0, 1, 2, 3)** |  |
| Technical T1 | Requirement T1.1: Ability for solution to  operate off-premises (e.g. SaaS) |  |  |
| Technical T1 | Requirement T1.2: Ability to provide  access to solution’s databases for reporting, dashboards (Compatibility with Microsoft Power BI) |  |  |
| Technical T1 | Requirement T1.3: Allow for single sign on the same as the District currently uses for Office 365 and Workday |  |  |
| Technical T1 | Requirement T1.4 Ability to provide Two  Factor Authentication |  |  |
| Technical T1 | Requirement T1.5: Ability to provide user-  friendly Audit Log capability, including:   * Date / Time Stamp * User Info * IP address * At least 3-month retention * Read and update transactions * Clear indication of changed values |  |  |
| Technical T1 | Requirement T1.6: Ability to comply with  SOC-1 / SOC-2 protocols |  |  |
| Technical T1 | Requirement T1.7: Ability to house all  CMSD data in the United States. |  |  |
| Technical T1 | Requirement T1.8: Ability to provide a  “hot site” for business recovery. |  |  |
| Technical T1 | Requirement T1.9: Ability for security to  be role based and allow for the assignment of roles from data in the integration. |  |  |
| Technical T1 | Requirement T1.10: Ability to create a  testing site available for CMSD to test configuration updates and changes before moving to production after implementation. |  |  |
| Technical T1 | Requirement T1.11: Ability to provide a  browser based solution. |  |  |
| Technical T1 | Requirement T1.12: Ability to comply  with SLAs for the following:   * Technical Assistance – 24x7x365 * Service Availability – 99.98% |  |  |