

# Great Hearts America: Request for Proposal for **Integrated Systems Platform Provider(s) for Home Office(s), All Regions**

Please submit any questions specific to this RFP during the timeframe of Monday, March 18 through Friday, March 22, 2024 to [RFP.Systems@GreatHearts.org](mailto:RFP.Systems@GreatHearts.org)

All questions, along with answers, will be documented and sent to all vendors who have responded to this RFP on Monday, March 25, 2024.

## Summary

Great Hearts America is currently accepting proposals through this Request for Proposal (RFP) for an Integrated Systems Platform Provider(s), to provide the necessary features to complete organizational functions/business requirements that include data/systems integration between various platforms such as Enrollment Systems, Human Resources Information Systems (HRIS), Customer Relationship Management (CRM), and Enterprise Finance System for our Great Hearts America headquarters, our Arizona, Louisiana, and Florida Region Campuses, Regional Offices, our Private schools, Great Hearts Christos (currently in AZ), our online academy NOVA (AZ & TX) and our Pre-K, Young Hearts. Any requested services in this RFP should not be considered a guaranteed commitment that such services will be used. The purpose of this RFP is to solicit proposals from various candidate organizations, conduct a fair evaluation based on criteria listed herein, and select a candidate(s) that provides the best value in service levels, cost, integrity, and future growth that supports Great Hearts America's needs. It is required that a vendor manage and support multi-state and multi-faceted entities within the Great Hearts America organization.

## Background

Great Hearts Academies was established in 2004 and is growing at a rapid pace. Great Hearts Academies is a non-profit network of public charter schools dedicated to improving education nationwide through classical preparatory PreK-12 academies. Great Hearts Academies provides a robust liberal arts curriculum incorporating advanced math and science, a focus on the arts and foreign language, and a range of extra-curricular activities and athletics. Our customer base consists of students in grades PreK-12; educational professionals, and community members who visit our facilities. Great Hearts Academies has expanded into new regions over the past year, to include Louisiana and Florida, as well as expanded our network to include private Christian schools (currently in AZ). We anticipate continued growth.

## Project Details

This project has been organized in three Phases. Phase I = collection of business and operational requirements; summation and analysis of requirements and current systems. Phase II = Evaluation matrix created, RFP issued, selected vendors presentations and demos scheduled, vendor(s) selected. Phase III = Implementation of selected Integrated Systems Platform(s) and transition from current system(s).

This proposal encompasses both current and anticipated future growth business and operational requirements. Our goal and objective is to alleviate, if not eliminate, excessive and unnecessary time and internal bandwidth currently spent due to inefficient, and lack of, integrated systems.

# Great Hearts America: Request for Proposal for **Integrated Systems Platform Provider(s) for Home Office(s), All Regions**

Phase II of this project allows RFP submittals between March 18 – April 22, 2024. We are anticipating vendor presentations and demos during the weeks of May 6 and May 13, 2024, with vendor selection(s) concluding prior to the end of May, 2024.

Phase III of this project will encompass the Implementation, to include transition and training, of the new Integrated Systems Platforms selected. The timelines for this phase will be determined and defined during, or at the conclusion of Phase II.

## Scope of Work

The selected vendor shall provide the following services:

- a. Procurement and licensing of the Finance System.
- b. Configuration of the software to meet our specific financial requirements. (with no/minimal customization)
- c. Data migration from existing financial systems. (minimum 1, preferable 5)
- d. Integration with other relevant systems (e.g., payroll, procurement).
- e. Comprehensive training and documentation for finance department staff.
- f. Ongoing support and maintenance services.
- g. Timely updates and enhancements as required.

## Contract Terms

The awarded contract will be for a three-year term. The contract will auto-renew for two more years unless written notice is given four to six months before the expiration date of the original contract.

## Technical Requirements

Cloud-based, uptime 99.99%, and scalable

Open and/or RESTful APIs with robust integration

- Must integrate with multiple business operating systems

Single sign on

Multifactor Authentication

## Data Access and Security Requirements

Must meet Industry Standard Data Security Requirements

Provide copies of SOC2 audit reports for the past 3 years.

Must provide Cybersecurity Insurance

Maintains audit logging to record access activity:

- Login/logout attempts by user and workstation
- User submitted transactions
- Initiated processes
- System overrides

Additions, changes, or deletes to application-maintained data

# Great Hearts America: Request for Proposal for **Integrated Systems Platform Provider(s) for Home Office(s), All Regions**

Upon discovery or reasonable belief of any data breach, notifies the Port by the fastest means available, and in writing within 24 hours. Notification should include:

- The nature of the breach
- The data accessed, used, or disclosed
- The person(s) who accessed, used, disclosed, and/or received data (if known)
- What has been done to quarantine and mitigate the breach
- What corrective actions has been taken to prevent future breaches

Provides daily updates regarding findings and actions performed until the breach has been effectively resolved to the Port's satisfaction.

Provides a report containing the results of the investigation of the breach.

## Support Requirements

Support services 24/7

Minimal response time (please define)

Availability of escalation process

Holiday service details provided in RFP submittal/proposal

Standard business after-hours service details provided in RFP submittal/proposal

Dedicated Account Manager

Multiple mediums of support (phone, email, instant chat)

## Evaluation Criteria and Metrics

Vendor proposals will be evaluated with specific metrics to measure capabilities of the Integrated Systems Platform based on the business and operational requirements collected during Phase I of this Project. Critical functions necessary under our Enterprise Finance Systems are listed below.

The Evaluation criteria will be in six (6) sections:

1. Product Quality
2. Experience & Scalability
3. Customer Support
4. Pricing & Value
5. Technology Requirements & Security
6. Integration, Implementation & Training

The Evaluation will be weighted, with the following metrics used for rating:

- 0 = Fail / Cannot provide
- 1 = Below Expectations / Caution / Weak
- 2 = Meets Expectations / Acceptable / Can work with
- 3 = Exceeds Expectations / Strong

## Finance Functions

General Application

Accounts Payable

Accounts Receivable

POS / E Commerce

# Great Hearts America: Request for Proposal for **Integrated Systems Platform Provider(s) for Home Office(s), All Regions**

Planning & Analysis (Budgeting and Forecasting)

Cash Management

Analytics/Dashboard/Reporting

Asset Management

Procurement

Payroll

Grant Management

Tuition Management

For details of each module's requirements, please refer to the attached Exhibit A and fill your response accordingly

## Implementation requirements

The successful vendor(s) will be able to provide both an estimated timeframe to complete transition in all regions/entities, as well as a detailed mapping and workflow chart that is collaborated with key Great Hearts dept leads to identify the transition of systems that will include, but not limited to: Timeframe to capture all existing data on current systems (within each affected dept); initial orientation and training on new system; ongoing training and support as needed.

## Reporting requirements

The successful vendor(s) will have the ability to provide Great Hearts mission critical reports derived from the aforementioned required functions/features lists and metrics on a daily / weekly / monthly / quarterly and annual basis, for the term of the contract, to the Great Hearts America Executive Team (details to be provided after vendor awarded contract). The reporting will need to provide overviews and summaries of systems efficiencies and errors.

## Legal and Regulatory Requirements

The successful vendor agrees to comply with any federal and state laws, regulations, and ordinances applicable to the requested services outlined in this RFP.

## Proposal Format

- Overview of the organization along with its technical expertise and any certifications held
- Services provided within the scope of the RFP
  - If any services are not being bid on, call out the exclusions clearly
- Completion of:
  - Question tables in the RFP
  - Attached features checklist
  - Attached pricing model and inclusion of any additional pricing documentation you want to provide
- Please attach an example of an aggressive systems migration plan
  - Indicate your timeline for a successful migration if you started, for example, on June 1<sup>st</sup>, 2024

# Great Hearts America: Request for Proposal for **Integrated Systems Platform Provider(s) for Home Office(s), All Regions**

- Indicate what would need to occur to complete the key elements of the project by July 1, 2024 (or provide appropriate details (tasks/timelines) on how long your systems migration usually takes)

**Note: If any information requested of the vendor in this RFP or supporting documentation is not provided in your response, Great Hearts may attempt to get the information from any customer facing portal provided by your company.**

## Response Format Guidelines

All responses and questions should go to the following email address:

- RFP.Systems@greathearts.org

**\*Proposals must be received by April 22, 2024 at 5 pm MST to be considered. Earlier proposal submissions will be greatly appreciated.**

## Company Profile

For us to get to know your organization a little better, please list and answer the following questions.

<b>1) Company's full legal name, main physical address, main telephone number, and appropriate contact information, including e-mail address.</b>	
Response	
<b>2) List any DBAs associated with your company.</b>	
Response	
<b>3) List all your company's offices in the current regions mentioned above (in Summary)</b>	
Response	
<b>4) Are you currently providing the services outlined in this RFP in the following regions?</b>	
Response	Arizona: Texas: Louisiana: Florida:
<b>5) Who is the main point of contact for this proposal? What is their phone number and email address?</b>	
Response	
<b>6) How long has your company been in business?</b>	

**Great Hearts America: Request for Proposal for Integrated Systems Platform  
Provider(s) for Home Office(s), All Regions**

<b>Response</b>	
<b>7) Do you have established partnerships with other systems vendors? What are the details of those relationships?</b>	
<b>Response</b>	
<b>8) Do you have experience integrating with other vendors and/or other vendor's systems? (These vendors could be direct competitors)</b>	
<b>Response</b>	
<b>9) Does your company have insurance? If so, please list your insurance coverage and the limits of each insurance line item.</b>	
<b>Response</b>	
<b>10) Does your company have CyberSecurity insurance? If so, please list your insurance coverage and the limits of each insurance line item.</b>	
<b>Response</b>	
<b>11) History A brief historical perspective on your company</b>	
<b>Response</b>	
<b>12) Unique Service Methods List ways in which your company does things outside of standard industry practices</b>	
<b>Response</b>	
<b>13) Company Values What are your organizations values</b>	
<b>Response</b>	
<b>14) Company's Culture Describe your company's culture</b>	
<b>Response</b>	

**Great Hearts America: Request for Proposal for Integrated Systems Platform  
Provider(s) for Home Office(s), All Regions**

<b>15) Project Management</b> Describe how your organization schedules projects / resources to ensure projects are completed on time and in a quality fashion	
<b>Response</b>	
<b>16) Differentiation from other Integrated Systems Platforms</b> Explain how you differentiate yourself from your competition	
<b>Response</b>	
<b>17) Historical Growth</b> Please provide an overview of your company's growth over the past five years	
<b>Response</b>	
<b>18) Financials</b> Provide financial statements for the two fiscal years immediately prior to this one	
<b>Response</b>	
<b>19) Strategy</b> What is your strategic plan and vision	
<b>Response</b>	
<b>20) References</b> Provide a list of three past or current clients ideally in the education industry that are of comparable size to Great Hearts Academies. Please include the following information for each reference: Company name / address / main company phone number / company website / name of the person who was your main point of contact (even if they are no longer with that company / who we should contact for obtaining a reference / the references phone number / email address	
<b>Response</b>	
<b>21) Client Experience</b> Please list in detail your experience with a similar client (disintegrated organization) outlining your process for integration and any measurables on the success of that project	
<b>Response</b>	

Great Hearts America: Request for Proposal for **Integrated Systems Platform Provider(s) for Home Office(s), All Regions**

**22) Litigation (against your organization)**  
Identify any material litigation, administrative proceedings or investigations in which your organization is currently involved and/or that has been settled within the past two (2) years

<b>Response</b>	
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### Support

Please answer the following questions about your provided support.

**1) How do you staff your helpdesk? (For example, the ratio of end users to support personnel)**

<b>Response</b>	
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**2) Do you offer security awareness notifications and/or training for end users?**

<b>Response</b>	
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**3) Please describe your internal and technical process for managing your client's expansion and future growth**

<b>Response</b>	
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### Additional Information

Please answer the following questions and attach the requested documentation to your proposal.

**1) Hourly Rates**  
Under what circumstances might you bill your customer an hourly rate?  
Please provide the schedule of rates by position / classification that we might get billed for at an hourly rate

<b>Response</b>	
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**Great Hearts America: Request for Proposal for Integrated Systems Platform  
Provider(s) for Home Office(s), All Regions**

<p><b>2) Letter from your CEO or President</b>  Please include a letter from your president, chairman or CEO certifying that  (I) No member of your firm has made inquiries or contacts with respect to this Request for Proposal other than interaction and communication outlined in the Restriction in Communication section of this RFP  (ii) No member of your organization will make any such inquiry unless they are declared the winner of the ISP RFP  (iii) All information in your proposal is true and correct to the best of her/his knowledge,  (iv) No member of your firm gave anything of monetary value or promise of future employment to a Great Hearts America employee or Board Member, or a relative of the same, based on any understanding that such person's action or judgment will be influenced</p>	
<b>Response</b>	
<p><b>3) Communication</b>  If you are selected as the ISP, please describe your Standard Communication Process with Great Heats America ISP Project Team and Great Hearts America Executive Team</p>	
<b>Response</b>	
<p><b>4) Sample Service Level Objective Graphics/Reports</b>  Please provide a sample of a report we would receive for tracking issue resolution / service provided by location and other typical metrics you share with your existing customers. Please also indicate how you measure customer satisfaction.</p>	
<b>Response</b>	
<p><b>5) Sample of Client Facing Self-Serve Portals</b>  Please provide samples of access we would have to any client facing portals.</p>	
<b>Response</b>	
<p><b>6) Sample Invoice</b>  Please provide a sample of what we can expect as an invoice. So, there will be no misunderstanding on pricing, please replace all pricing fields with "\$\$\$" or some other character where the pricing would normally be listed.</p>	
<b>Response</b>	
<p><b>7) Security</b>  Describe your strategy for securing your clients' data. Include your company's policies as well as any security certifications that you possess</p>	

**Great Hearts America: Request for Proposal for Integrated Systems Platform  
Provider(s) for Home Office(s), All Regions**

<b>Response</b>	
<b>8) Client Relationship</b> <b>(a) Describe how you would manage your customer relationship at Great Hearts America</b> <b>(ii) Describe the responsibilities of everyone proposed to be assigned to Great Hearts America</b> <b>(iii) Describe how after-hours support would be available</b> <b>(iv) Describe how you would report to users about down systems, system maintenance, system changes that impact the end user</b> <b>(v) Describe how your on-site support process would work and describe any special requirements that would need to be fulfilled by Great Hearts America personnel</b>	
<b>Response</b>	
<b>9) Fees</b> <b>List any additional fees not included in the ISP Pricing spreadsheet including, but not limited to:</b> <b>(i) Any one-time fees</b> <b>(ii) Additional work outside of what is listed in the RFP</b> <b>(iii) Escalation fees</b> <b>(iv) Response and emergency fees</b>	
<b>Response</b>	

**Definitions:**

- AP/AR - Accounts Payable / Accounts Receivable
- API – Application Programming Interface
- CRM – Customer Relationship Management
- ESS – Exceptional Student Services
- GHA – Great Hearts America
- HRIS – Human Resources Information System
- ISP – Integrated Systems Platform
- POS – Point of Sale
- SMS – Short Message Service