Name of Primary Contact at the School

Email address of primary contact

School Name |  SCHOOL ADDRESS

for Student Information System

[SCHOOL NAME] Request for Proposal

[Year]

**Request for Proposal Example**

This document was designed to help schools with their search and evaluation of a new student information system. Please read through this document carefully. All requirements listed below may not apply to your school. Please feel free to download, edit, and use this document for your search.

If you would like additional materials, or would like to learn more about Veracross, please don’t hesitate to contact us at [sales@veracross.com](mailto:sales@veracross.com).

Best of luck with your search!

Best regards,

The Veracross Team

**Request for Proposal: [School Name] Database System**

**Executive Summary**

**Summary of School:**

* Location
* Campuses
* Grade Levels
* Number of Students
* Values

**Summary of Project:**

*Example: Veracross Academy* is looking to replace its current databases used for Admissions, Advancement, and School/Student Information with a modern web-based system. Although we may be looking to add other modules later on, we are initially focusing exclusively on these first. The following describes what we are seeking in the new database system.

**Summary of Request:**

Please indicate if you “Meet the Requirements” or “Do Not Meet the Requirements” and provide documentation, examples and/or screenshots to support your response.

Please submit proposals via email to our [job role], [insert name of primary contact at school], at [email address] by [insert due date]. Please share proposals electronically so they can be easily shared with members of the selection committee.

This RFP is not a contract and responding to it does not guarantee selection.

**Selection Timeline**

The Database Committee will select vendors from whom we wish to see demonstrations in early [insert month] but proposals can be submitted until [insert month]. We want the potential vendor to submit documentation and/or screenshots demonstrating their ability to meet our General and Functional Requirements. Selection will be based on the vendor’s ability to document and demonstrate their system’s ability to meet our requirements, product cost, and references.

The goal is to begin the transition to a new system in the [Spring] and during the [Summer of 2021].

If you have additional questions about this project, please email them to [insert name of primary contact at the school] at [email address].

**General Requirements**

1. We are looking for a hosted, web-based system that does not require the school to maintain a local server.
2. School data must be secure, safely backed up, not susceptible to ransomware.
3. Student, parent, and employee data is not duplicated across systems offered by the vendor. Ideally, these constituencies would have only one record.
4. Additionally, other key data points used by more than one module (student schedules, grades, enrollment data, financial aid, etc.) must flow seamlessly through the modules.
5. Querying, exporting, and reporting are vital to the success of this system. The platform must have intuitive, comprehensive functions that are accessible to all users and can be mastered by users of varying skill levels.
6. The platform has an API and comprehensive read/write capabilities.
7. Data changes system-wide are tracked in an audit log showing the user making the change, the before and after value, and the date and time of the change.
8. Password requirements, including two-factor authentication, are able to be enforced for particular roles with access to sensitive information within the software.
9. All users and departments at the school use email as a core mechanism for communicating with constituencies. Email or other messaging tools must be convenient, accessible, and fully-featured. Additionally, email communications with constituents should be tracked and stored. System can handle mass emails and they get delivered to everyone. Messages from the system have a clean, professional appearance.
10. The system accommodates gender options other than male or female and name changes for transgender students.
11. Our school supports family structures of all types. Please describe how your system manages relationships.
12. The vendor will set the school up for a successful implementation, including careful data migration, implementation phasing, effective training, and operational support.
13. Vendor should offer strong training options for all users during product implementation, for new users joining the organization in future years, and ongoing professional development for all users.
14. In general, the platform empowers our school for self-service rather than vendor service.
15. Vendor should have an effective support model, preferably with a two-fold approach:

* Ticketing System with timely turnaround.
* Project manager or account manager with oversight of the big picture who also serves as an advocate for the school.

1. The vendor will demonstrate commitment to customer feedback and a track record for ongoing product development and enhancement. Vendor designs the product roadmap based on customer feedback, is transparent with the roadmap, and consistently executes on the roadmap with a high degree of reliability and quality.
2. Vendor is highly regarded by client schools. References indicate that the vendor’s platform successfully supports their operations. Please provide references*.*

**Functional Requirements by Category**

**Admissions**

1. Inquiry form seamlessly integrates with the school’s website and creates records within the system without requiring additional data entry.
2. The system can track history of inquiries/applications for specific users across multiple years prior to enrollment.
3. Ability to create our own application questions on forms including student specific questionnaires.
4. The school tracks very detailed testing data during the admissions process and after the student enters the school. The platform should either be able to meet testing requirements or facilitate the exchange of data between the admissions/student information systems and the custom testing database.
5. System for tracking admission additional requirements including admissions visits, collection of recommendations, a photo upload option, uploading of files and application fee payment.
6. Admissions review process management tools including assigning reviewers, criteria scoring and reviewer recommendations.
7. Ability to display online decision letters and allow for parent response.
8. The system provides tools for year-over-year statistical reporting, admissions goal setting, etc.

**Enrollment Management** (Admission and Business Office work together in this area)

1. The system includes or integrates with an online enrollment contract.
2. Tuition amounts, fees, discounts, etc. can be configured by the school to appear on contracts. This does vary by grade level, whether the student is a staff or faculty child, whether they are a sibling at the school, etc.
3. Payment plan selection along with tuition refund insurance and optional extra selections integrate with the school’s tuition receivables system. Payment of deposit also integrates with the school’s tuition receivables system with competitive payment processing fee rates.
4. Detailed summary reports are available to help Admissions and Business Office personnel and Academic people manage enrollment.

**Academics**

1. The system positions all divisions for successful progress report and report card production, including:
   1. Supports our specific types of assessments (numeric, class curriculum comments, detailed qualitative rubrics, and student comments).
   2. Efficient workflow for teacher entry of reports.
   3. Efficient report card management by administrative staff.
   4. Report format that displays information clearly and represents the school well.
   5. Electronic distribution, preferably via a student and parent portal.
   6. Provides a workflow for grade and comment review after teachers enter them.
2. Co-teachers can be assigned to classes and given privileges for attendance and progress/report card data entry. However, the school can control the order that teachers appear such that lead teachers always appear first and assistant teachers always appear second. Control over the order extends system-wide through all screens and printed materials, both internal and external.
3. The system includes a feature for managing parent-teacher conferences, including online parent registration.
4. The system provides teacher communication tools.
5. Notices of performance (behavior or academic warnings) - simple entry for teachers/Academic Advisors and ease of notification to parents.
6. Parent Portal intuitive for parents - parents can update their information and access academic information about their student. Ideally this could integrate with other areas of the system and also allow our school to create a communication hub.
7. Historical data such as report cards and transcripts are accessible in the system even for former students and alumni.

**Scheduling**

1. Scheduling tools are intuitive and modern.
2. Students can change classes mid-term or mid-year without losing history.
3. Schedule reports are flexible, comprehensive, and clear. Please provide samples.
4. Scheduling allows for varied times of classes (e.g., daily / alternating days/ one day per wk).
5. Schedule documents can display on Faculty, Parent and Student Portals. Preferably, a daily schedule can show the classes and activities they are involved in for that day.

**Dismissal and Attendance**

1. The system offers a module for student dismissal management, or partners with a vendor for dismissal management.
2. Contact information for busing companies and private drivers can be tracked and displayed on daily dismissal reports.
3. Students can have a default dismissal method for each day of the week. Parents can specify daily dismissal details electronically.
4. Daily dismissal reports integrate with student attendance.
5. Student attendance reports can be easily accessed by families.
6. Dismissal reports can customized.
7. Can easily see “Where is this student at this current time?”
8. Parent portal lets parents know if absences are excused or not.
9. Easy access for teachers to view and update a student’s attendance.

**After School/Summer Program**

1. Online registration is available for both current students and non-students from the community. Ability to create multiple program registrations.
2. System will create student enrollment records in classes based upon receiving payment, not based on selection only.
3. System provides waitlist support and class registration conflict management.
4. A deposit or the full tuition can be collected electronically with the registration. The deposit payment and charges for the outstanding balance integrate with the school’s tuition receivable system and financial management system.