The following request for proposal/scope of work discussion items need to be addressed by the Financial Policies and Procedures advisory sub-committee assembled to address the creation of a Financial Transparency Reporting System:

1. Can we define what a “layperson” means in relationship to the system use and functionality?
2. Should the application require a verification or approval step once the data has been loaded and processed into the new vendor system?
3. Excel – buckets of data posted by the district
   1. Raw data
   2. Chart of Accounts V Lookup (provided by CDE)
   3. Account element definitions
   4. List of all schools (names) in district with corresponding codes
   5. In order to present data in a meaningful way – demographics/rural and urban, free and reduced, student count, high poverty etc. – additional tabs in the Excel data posted by the district will be necessary
4. Where will the demographic data, school performance / academic performance data come from for correlation to the financial data? CDE will not be supplying this data.
5. Is there a minimum number of graphics/dissection of data that vendor will need to produce? If so, what does that look like? Do we look to School View for some examples?
6. Should the application provide the data in both an on-line and in a printed form?
7. What is the level of help desk support required by the vendor for system issues (24/7/365 or 8/5/253)? Is this necessary?
8. How should school number or name changes be handled by the system?
9. How much history data should be kept and tracked as part of the system?
10. How important is it that the vendor has experience working with all districts across a state simultaneously?
11. How important is it that a vendor has done this type of work before in other states?
12. How should training and documentation be delivered to the districts on the application including the data acquisition and reporting processes?
13. How or should CDE be involved from a maintenance and support perspective after the rollout of the system?
14. When do we solicit people to participate on evaluation of RFP? What does this group look like?