

# Request for Proposals No. 2026-12

## Addendum 02 – Q&A

This document is posted to capture the questions received, and agency answers provided, during the question and answer period of RFP No. 2026-12, issued November 10, 2025.

All amendments, addenda, and notifications related to this procurement will be posted on the [OSPI website](#) (if this was an open procurement) and on the Washington Electronic Business Solution ([WEBS](#)) website. Additional questions concerning this procurement must be submitted to [contracts@K12.wa.us](mailto:contracts@K12.wa.us). Communication directed to other parties will be considered unofficial and non-binding on OSPI, and may result in disqualification of the Consultant.

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1. **Question:** Is there an incumbent for this contract? If so, please provide the incumbent's name, current contract number, duration, historical level of effort, and value of the contract.  
**Answer:** There is no incumbent contractor. SAFS was built in-house as a custom solution.
2. **Question:** Will the incumbent be eligible to bid on this project?  
**Answer:** N/A; there is no incumbent contractor.
3. **Question:** Can the work be performed remotely?  
**Answer:** Yes, work may be performed remotely.
4. **Question:** If remote work is allowed, can a part of the work be done from outside the US, such as in India?  
**Answer:** No, this project requires all workers to be US based and all work and data remain inside the United States. The RFP will be amended to reflect this requirement.
5. **Question:** Who conducted the SAFS feasibility study and Alternatives Analysis completed in 2024? Was this study performed internally by OSPI, or by an external vendor? If conducted by an external vendor, please identify the vendor.  
**Answer:** The [2024 Feasibility Study](#), created by Garter Inc., is available on the OSPI website.
6. **Question:** For this RFP, do the minimum and desirable qualifications need to be met by the prime Consultant, or can they be met by a named subcontractor or partner included in the proposal?
  - a. If a subcontractor meets the qualifications and is clearly identified, will the proposal be considered responsive?



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b. Is the subcontractor's past performances accepted and evaluated?

**Answer:** The proposal must meet the minimum requirements.

7. **Question:** Can OSPI provide expected peak data volumes, calculation run frequencies, and performance targets (for example, maximum acceptable calculation or reporting latency)?

**Answer:** Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations.

8. **Question:** Beyond the stated preference, does OSPI have reference architectures, approved platforms, or prohibited technologies that bidders should consider when proposing the SASQUATCH solution?

**Answer:** OSPI is currently in the process of reviewing agency architectures, platforms, and best practice processes. Currently, OSPI is open to the proposed solution(s) that best fit the needs of the agency and the Apportionment program.

9. **Question:** If multiple vendors are selected, will OSPI designate a lead integrator, or is each vendor expected to independently manage cross-section integration responsibilities?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed.

10. **Question:** How many years of historical SAFS data must be actively accessible within SASQUATCH versus archived for reference only?

**Answer:** There is no longer a requirement to migrate seven years of data into the new system, as suggested in the prior RFP. Our revised data requirement calls for retaining the prior year, current year, and the ability to project the next four years. New data collected will need to be accessible in a format that allows for transmission, transfer, or export into excel files by agency staff.

11. **Question:** Does OSPI have expectations for minimum sprint velocity, team size, or on-site presence during key phases?

**Answer:** OSPI does not require a minimum sprint velocity or specific team size. OSPI will work with each Contractor to establish a sustainable sprint cadence that also delivers working software in each sprint and addresses all prioritized requirements by the end of development. The contractor is responsible for adequately staffing the project team to ensure success. Work may be performed offsite, with Microsoft Teams used for communication. However, it may be necessary for vendors to participate in in-person meetings from time to time.

12. **Question:** Is the \$9M estimate expected to cover all three work sections equally, or does OSPI anticipate heavier investment in specific areas (for example Data Calculations)?  
**Answer:** OSPI has no preset expectations for how the project budget may be distributed between work sections. Rather, we provided an estimate of expected available funds for this project work for Bidder's reference.

13. **Question:** Should bidders assume fixed O&M pricing for optional years, or propose variable pricing tied to usage or support levels?  
**Answer:** Bidders should provide M&O proposals to include successful support for the system, ensuring the new system meets program expectations and compliances. Provide your best proposal for a solution that aligns with the project's values for sustainability, security, and success.

14. **Question:** Is a recording of the pre-bid conference available? If so, can OSPI share the recording or a written summary of key points and clarifications discussed?  
**Answer:** [Pre-Bid Conference Q&A](#) was released as Addendum 01 on 12/16/25.

15. **Question:** If a vendor did not submit a Letter of Intent by the stated deadline, are they still eligible to submit a proposal for this RFP?  
**Answer:** Yes, proposals will still be accepted for bidders who did not submit a Letter of Intent by the recommended date of 12/17/25.

16. **Question:** Will this contract result in a single award or multiple awards?  
**Answer:** While OSPI's preferred approach to this project is to engage a single vendor capable of delivering all three work sections of this project (i.e., Data Collection, Data Calculations, and Data Reporting), we acknowledge that awards may be distributed across multiple vendors.

17. **Question:** If multiple awards are anticipated, could you please share the expected number of awardees?  
**Answer:** To be determined, based on bidders' ability of delivering all three work sections of this project: Data Collection, Data Calculations, and Data Reporting. Ideally, OSPI would prefer one vendor to provide all project development. However, we are cognizant of the challenges in finding a single solution to address all project requirements.

18. **Question:** We have not submitted the letter of Intent for the School Apportionment Modernization, RFP # 2026-12. Are we still eligible to submit the proposal response?  
**Answer:** Yes, proposals will still be accepted for bidders who did not submit a Letter of Intent by the recommended date of 12/17/25.

19. **Question:** What is the current technology stack on which the systems is built upon?  
**Answer:** The current system relies on an outdated technology stack, many of which are unsupported or near end of life. The monolithic architecture and legacy dependencies significantly limit our ability to scale, integrate with modern platforms, and meet current cybersecurity standards. This modernization project seeks to replace the legacy stack with a cloud native architecture designed for long term sustainability.

20. **Question:** Unfortunately, we were not award of this opportunity until after the 12/9 Pre-Bid Conference date. Is it possible we could get a copy of the recording and presentation materials/slides?  
**Answer:** A copy of the Pre-Bid Conference recording is not available, but we have posted questions and answers in the form of Addendum 01 to the [OSPI website](#) and WEBS.

21. **Question:** It is possible for SNO to still qualify for an award if we did not submit the recommended Letter of Intent date by the 12/17 date?  
**Answer:** Yes, proposals will still be accepted for bidders who did not submit a Letter of Intent by the recommended date of 12/17/25.

22. **Question:** Is there an incumbent contractor, and if so, what is that company name, past contract number and awarded value and term?  
**Answer:** There is no incumbent contractor. SAFS was built in-house as a custom solution.

23. **Question:** The recommended deadline for submitting a letter of intent has passed, but we have come to a late decision to bid on the project, and are likely to move forward. Would you mind confirming if OSPI would prefer us to submit a formal letter of intent at this time?  
**Answer:** A Letter of Intent is not required, so you may submit a proposal without first submitting a Letter of Intent. However, it would be helpful to the evaluation team to have an estimated number of bidders, so we'd appreciate a letter if you're able to submit one.

24. **Question:** What is the correct percentage score for Demonstrations (20% or 30%)?  
**Answer:** There is a typo in section D.1. Evaluation Procedure, under Scoring Notes on page 49 of the RFP. The correct percentage score for each Demonstration work section is 20%. The scoring workflow graphic on page 49 is correct.

25. **Question:** What is the correct percentage score for the Technical Integration Plan (10% or 20%)?  
**Answer:** There is a typo in section D.1. Evaluation Procedure, In the Evaluation Gates Table on page 48 of the RFP. The correct percentage score for the Technical Integration Plan is 10%. The scoring workflow graphic on page 49 is correct.

26. **Question:** Should the base scoring add to 100% before preferences, or is 110% intentional?

**Answer:** There is a typo in section D.1. Evaluation Procedure, In the Evaluation Gates Table on page 48 of the RFP and in the scoring notes on page 49. Base scoring adds up to 100% before additional (10%) preference points are awarded. The scoring workflow graphic on page 49 is correct.

27. **Question:** Are you able to share screenshots of the core workflows of the legacy SAFS application?

**Answer:** No additional project documentation is available through this RFP. Additional access will be provided to the Apparent Successful Bidder(s) during the discovery phase of the project.

28. **Question:** If OSPI awards different work sections to multiple vendors, what governance structure will be in place to manage inter-vendor coordination? Who has final decision-making authority on integration points?

**Answer:** OSPI will have final decision-making authority on integration points. OSPI will have a designated project manager oversee any inter-vendor coordination as necessary.

29. **Question:** If OSPI awards different work sections to different vendors, who is responsible for defining integration specifications between the sections?

**Answer:** The integration between the sections will be limited to data structures, data definitions, data access, and data definitions. The individual vendor or vendors will be responsible for ensuring the system data is consistent with OSPI requirements as necessary for the calculation and reporting sections.

30. **Question:** The Technical Integration Plan requires “centralized data architecture.” Would multiple vendors share common infrastructure (database, authentication, etc.) or would each section be independently deployed? If shared infrastructure, who hosts and maintains this centralized infrastructure if multiple vendors are involved?

**Answer:** If multiple vendors are selected, the sections may be independently deployed. Our intent is to allow multiple vendors to develop segments of the overall system that can be integrated together through data transfers or data access tools. The work sections may be hosted separately so long as they have structures that allow consistent transmission and transfer of data between the work sections as necessary to achieve the agency's collection, reporting, and calculation requirements.

31. **Question:** What is the complete scope of historical data migration? The 2025-19 RFP mentioned 7 years of data - is this still the requirement for the Sasquatch system? What data validation is required to confirm migration accuracy?

**Answer:** There is not a requirement to migrate 7 years of data into the new system. New data collected will need to be accessible in a format that allows for transmission, transfer, or export into excel files by agency staff. The system will need the previous year, current year, and the ability to project the next four years.

32. **Question:** What is OSPI's planned timeline for decommissioning the current SAFS system? Will there be a parallel run period, and if so, for how long? What validation criteria will determine when the legacy system can be decommissioned?

**Answer:** OSPI has not determined a specific length of time for parallel processing in the calculation hub. OSPI does not plan to run the data collection components and reporting components in parallel.

33. **Question:** Are there specific API standards or integration patterns that OSPI or WaTech mandate (REST, GraphQL, etc.)?

**Answer:** OSPI is currently reviewing preferred agency API standards and does not have policy guidance at this time. Our preference is for REST API standards, and best practice standards that are most appropriate for the system, and the actual configuration and development of APIs will be confirmed during the lifecycle of the project.

34. **Question:** Is the system expected to run on a native application (e.g. windows desktop, iOS, Android) or does a web application work?

**Answer:** OSPI is open to both native and web-based solutions; however, we prefer a cloud-based web application if it meets the project requirements.

35. **Question:** How many concurrent external and internal users should the system support during peak performance times and what is the required response time during these times?

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users. Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations.

36. **Question:** How many distinct business rules and formulas currently exist in SAFS? What is the process for validating that all rules have been accurately migrated?

**Answer:** SAFS currently comprises approximately 1,120 distinct business rules and formulas that must be validated upon migration. These can be validated by one or more of the following options:

- Report-level reconciliation – For each SAFS report (e.g., 1191, State Summary, etc.) – run and compare the same district/school test data in legacy SAFS and the new system
- Compare – Line-item outputs, subtotals, grand totals, and any variance must be traceable back to a specific formula.
- Edgecase and exception testing – Null/missing values, zero enrollment, etc.
- Dependency and cross-reference validation
- Confirm that reference input exists
- Confirm that chained formulas (formulas referencing other formulas) are executing in the proper order
- Validate school-year-specific formulas – Confirm that the formula inventory matches the school-year-specific formulas – E.g., No retried formulas are migrated, etc.

37. **Question:** Can OSPI provide more details on the typical timeline between legislative session close and when updated calculations must be operational? How does this vary by component (enrollment vs. apportionment vs. financial statements)?

**Answer:** In odd numbered years, OSPI typically must update calculation estimates for school districts to use for their budgeting process (F-203) within 30 days. In even numbered years OSPI must update these estimates within 70 days. Any changes to other systems must typically be updated before September 1 for implementation in the next school district fiscal year.

38. **Question:** For the dashboard sandbox feature, what level of data isolation is required? Should sandbox testing use production data, synthetic data, or anonymized production data? How many years of historical data must be available in the sandbox?

**Answer:** The sandbox should have six years of data available (prior year, current year, and subsequent four years (projection data). Sandbox should use production data, with the ability to update or change for projection and modeling purposes.

39. **Question:** What approval workflow is required before sandbox formulas move to production? What validation/testing is expected?

**Answer:** Validation and testing is expected prior to moving changes into production, but the nature, timing, and extent of the validation and testing will vary based on the change being implemented. In all cases, a change will require the approval of the employee charged with testing and a supervisor. Some changes may also require IT approval depending on the type of change being implemented and potential impacts to other connected systems.

40. **Question:** With 2,287-2,747 external users from 380+ LEAs, what authentication method does OSPI prefer? Should vendors plan for federated identity or individual account management?

**Answer:** OSPI is currently working to transition existing applications to Entra ID for

authentication. New systems such as Sasquatch will likely be expected to use Entra ID as well. Final determination of authentication and authorization methods will be confirmed in the lifecycle of the project.

41. **Question:** Which reports must remain publicly accessible, and are there specific accessibility or performance requirements for these?

**Answer:** All "reports" must remain publicly accessible, but OSPI intends to reduce the number of static reports and increase the number of available ad-hoc, user defined reports with the implementation of the new system through Power BI, Tableau, PowerQuery, etc. There will continue to be some reports that are static and available in PDF format.

42. **Question:** Does OSPI have preferences for specific BI platforms if included (Power BI, Tableau, etc.)?

**Answer:** OSPI is a Microsoft shop and currently uses Power BI for some agency processes. However, we are open to different solutions and proposals. Be sure to include all costs for third-party applications or platforms within your cost proposal.

43. **Question:** What testing environments will OSPI provide? Will vendors need to provision their own development/testing infrastructure?

**Answer:** Vendors will need to provide their own development/testing infrastructure as part of the project.

44. **Question:** What is the expected cadence for the recurring governance meetings for: steering committee, project management reviews, and technical workgroups?

**Answer:** OSPI engages in Agile development processes, and project development meetings cadence will reflect that expectation. In addition, project management meetings will be scheduled as follows: Monthly Steering committee meetings, weekly project management status and update meetings. Meeting schedules will be adapted to project needs, including adding or removing meetings, as required.

45. **Question:** What is OSPI's change request process during development? How are scope changes evaluated and approved?

**Answer:** OSPI will maintain a change request log and process to capture and review requests. We will work with the vendors to confirm if requests are in scope, out of scope, defects, bugs, or enhancements. Each request will then be reviewed for timeline, additional cost (if any), and priority prior to any approval to complete the work.

46. **Question:** What are the expected response times for key user transactions? What are the peak concurrent user requirements?

**Answer:** Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS

systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations.

47. **Question:** What are the specific approval criteria for releasing the 15% holdback at each funding gate? Who has approval authority?

**Answer:** Gated holdback funding is released to the agency after a review and confirmation of the successful completion of each gate's requirements, as documented in the project Tech Budget. This includes demonstration of project compliance and acceptance of deliverables.

48. **Question:** What percentage of time should vendors assume for Apportionment subject matter expert availability? What is the expected response time for clarification requests?

**Answer:** The subject matter experts will be available on average 20 to 25% of the week. Some weeks they will have more time available and others less – based on the monthly and annual processing time for normal payments and reporting deadlines. Generally, responses and clarifications will be provided within 24 hours – but some requests may take longer based on the complexity and nature of the request.

49. **Question:** What is the typical timeframe for WaTech Security Design Review approval? Should vendors build this timeline into their project schedule?

**Answer:** WaTech Security Design Review will be conducted concurrently with project work and often requires back and forth collaboration between the agency and the project team. It is not necessary to block out time in the schedule for this activity alone, but rather to be aware that this activity will need to take place alongside development.

50. **Question:** What is the expected peak daily load and average daily processing volume of calculations for purposes of sizing and performance?

**Answer:** Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations.

51. **Question:** The cost proposal must include "three years of post-development maintenance and operations costs." Should vendors assume the same level of ongoing support/enhancements each year, or a declining model as the system stabilizes?

**Answer:** Vendors should include three years of post-development maintenance and operations costs based on the solution proposed. OSPI reserves the right to extend contracts and initiate the post-development M&O based on your proposal. Be sure your proposed solution confirms appropriate support to ensure the system's continued operational success.

52. **Question:** the scope of Organizational Change Management include external users (e.g. LEA staff, etc.) or internal users only?

**Answer:** OCM will include all impacted stakeholders, internal and external users to ensure a supported and successful transition to the new system.

53. **Question:** How many internal OSPI staff and external LEA users will require training? What is the anticipated turnover rate that would require ongoing training?

**Answer:** OSPI expects that approximately 20 internal users will require training. It is expected that approximately 2800 external users will require training. Your training proposal should ensure all staff are provided with appropriate training, and that OSPI has replicable training materials to ensure onboarding and additional training as needed. Anticipated training needs related to staff turnover should be assessed as part of the Organizational Change Management plan.

54. **Question:** Are Organizational Change Management and Training expected to be included during the three-year Maintenance and Operations period after Development is complete?

**Answer:** Organizational Change Management plan should include an assessment of the project and Agency's needs to ensure stakeholders are prepared, supported, and enabled to succeed through the transition to the new solution.

55. **Question:** Should vendors plan for on-site training at districts, or primarily virtual/self-serve enablement?

**Answer:** Vendors should plan on training internal users through a variety of methods and materials to ensure onboarding and transitional success of internal users. Our preferred method for external users is virtual training through a train the trainer model. OSPI expects that its staff and selected school districts and other end users will receive training, including reusable training documentation, and then will train other users. On-site training is not anticipated. We are looking for a training approach that ensures seamless transition to, and continued success in, the proposed solution.

56. **Question:** Are you open to using a Digital Adoption Platform such as SAP WalkMe to support change management, communications, and training?

**Answer:** While Sasquatch will be ingesting data from a large number of external users, the significant management of this new system will be focused on a small group of talented internal users, so it may not make business sense to engage an extra adoption solution. WalkMe's business model makes sense for medium to large scale rollouts of 1000s of users. This does not prevent you from proposing a solution that includes third party tools or applications.

57. **Question:** Are you open to a train-the-trainer approach for end user instructor led training delivery wherein EPI-USE will develop end user instructor led training materials and will train your trainers to deliver the content to end users?

**Answer:** Vendors should plan on training internal users through a variety of methods and materials to ensure onboarding and transitional success of internal users. Our

preferred method for external users is virtual training through a train the trainer model. OSPI expects that its staff and selected school districts and other end users will receive training, including reusable training documentation, and then will train other users. On-site training is not anticipated. We are looking for a training approach that ensures seamless transition to, and continued success in, the proposed solution.

58. **Question:** What tools/technology do you use to create eLearning content?

**Answer:** OSPI currently uses the Canvas LMS system for some agency trainings, however, it is not the only acceptable tool for proposals.

59. **Question:** Are you interested in Articulate Rise developed training materials such as interactive, self-guided eLearning courses and quick reference guides/micro-learnings?

**Answer:** OSPI currently uses Canvas LMS system for some agency trainings. Although training materials developed in Articulate Rise can be imported to Canvas using a SCORM package, they can't be edited or updated in Canvas without maintaining the license in Articulate Rise. OSPI's expectation is that all training materials are owned by OSPI and able to adapt with the system as it changes. Be sure to account for this additional expense and training requirements within your proposal, if this is part of your long-term solution.

60. **Question:** Do you have a learning management system for end users to enroll in training courses and to access training content?

**Answer:** OSPI currently uses Canvas LMS system for some agency trainings.

61. **Question:** Do you have a dedicated organizational change management (OCM) function?

**Answer:** No, OSPI does not currently have a dedicated OCM lead for post project support. It is the expectation that the project OCM tasks and documents will continue to support staff training and onboarding support after the system moves to production.

62. **Question:** Do you require training and/or communications materials to be translated to any language other than English?

**Answer:** No

63. **Question:** Will you appoint OCM, Communications, and Training Leads for this project or hybrid role(s) to cover some or all of these workstreams?

**Answer:** OSPI will have staff to address these needs – but does not anticipate appointing staff dedicated solely to these responsibilities. OSPI currently expects the subject matter experts to fulfill the role of communication and training leads.

64. **Question:** Do you have a preferred low-code platform?

**Answer:** No. And please note that for this version of the RFP, we're no longer expressing a desire to use a low-code platform, although you are welcome to submit a solution that includes one.

65. **Question:** Requirement 162TEC states "The solution must support ### (TBD) internal and external concurrent users accessing the system with minimal delayed response time during peak performance times." Is the ### (TBD) information available?

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users.

66. **Question:** Requirement 163TEC states "The system must be able to provide with minimal degradation ### (TBD) transactions per second during peak load." Is the ### (TBD) information available?

**Answer:** We have not determined this value, but we will try to specify one that conforms to broadly accepted standards for external-facing government systems of our size, which is estimated to support ~ 7 billion calculations per hour and peak user access of ~3000 concurrent users each executing CRUD on SAFS against a total record count totaling 1 billion + records.

67. **Question:** Requirement 187TEC states "OSPI must retain ownership rights to both data stored within the SAFS system, and the coding of the system itself." Can you elaborate on the definition of "coding" in this statement?

**Answer:** Please substitute "source code" for "coding"

68. **Question:** Can you provide technical documentation, including the ERD, for the existing system? If not, can you provide information on system size such as number of tables, number of formulas, approximate record counts, codebase, and complexity.

**Answer:** The best we can offer at this time are the tables displayed on pages 12 – 16 of the RFP. ERD work will be required of the contractor, in collaboration with OSPI staff, in the first phases of this project.

69. **Question:** Can provide your Scrum standards prior to the proposal due date, as they may affect proposal pricing?

**Answer:** So long as your method provides the roles and ceremonies described in the 202 Scrum Guide, any details can be negotiated with the Project Manager and Project Owner.

70. **Question:** Are there any statewide modernization efforts, other than One Washington, that SASQUATCH must coordinate with?

**Answer:** There are no other known statewide efforts impacting the Sasquatch project at this time.

71. **Question:** Under Section 24 (Insurance) of the Terms and Conditions, Technology Professional Liability, Technology Professional Liability & Cyber Liability, and Cyber Risk Liability are listed as separate coverage requirements. Can you clarify whether you are expecting stand-alone policies for each of these coverages, or if a single policy or combined coverage would be acceptable to satisfy these requirements?

**Answer:** We have no preference between standalone policies or a single blanket policy, so long as the coverage standards are met.

72. **Question:** When a district needs to correct something in their data, what should the resubmission process look like, and should the system keep a full history of every submission and change (who did it and when)? Ref: Section A.5 Scope of Work (overwrite vs add; save incoming report; audit trail), p. 15–16.

**Answer:** The system should record all changes and history for review and audit purposes. The solution functionality of the system will be worked out during discovery as part of the project.

73. **Question:** Are you wanting built-in reports that help districts compare this cycle to the last one, understand what caused changes, and confirm totals match, and are there any existing report formats you would want us to copy? Ref: Section A.5 Scope of Work (side-by-side

**Answer:** Yes, we desire such reports. For examples of our legacy reports for external users, refer to <[Apportionment, Enrollment, and Fiscal Reports | OSPI](#)>.

74. **Question:** During the pre-bid meeting there was a slide that stated, "Data Calculation Award will be primary for coordination and development," Can you tell us what that means day-to-day? For example, does that awarded vendor lead cross-vendor sprint planning and release coordination, or does OSPI lead, and vendors coordinate as peers?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible for ensuring coordination including addressing disputes and coordination issues between vendors as needed.

75. **Question:** RE: Section Data Handling and Migration Strategy, p. 19-20: Can you clarify whether you mean:

1. All data from the legacy SAFS system should be migrated to the new system or
2. The data required for the parallel testing run before going live of the new system

**Answer:** All legacy system data from the prior year will need to be migrated to the new system.

76. **Question:** If the answer is "All data should be migrated", then the follow up questions are: How many years of data?

**Answer:** The system will need the previous year, current year, and the ability to project the next four years.

77. **Question:** What are the expectations on how the legacy data is handled in the new system? e.g. Migrated data is for retention purposes only and not allowed to be edited in the new system.

**Answer:** Previous year legacy data year will need to be available for editing as some of the data may be required for the current year calculations and may be subject to audit adjustment or error correction.

78. **Question:** There is a statement "provide also paper forms for select data sets". What is your expectation on how the system would handle this data? How many datasets are there currently that would require a paper form? Ref: A.5 Scope of Work, Data Collection and Review column, (second row), p. 15.

**Answer:** The system must have the ability to allow manual input into the system for small districts or in the case where a user's system is incapable of transmitting the data electronically. The paper form would serve as the audit source document for the user. Currently only a handful of subsystems require a paper form, and we expect none to "require" a form in SASQUATCH – but we want paper forms available where necessary.

79. **Question:** RE: A3 Background: "SAFS includes 11 data input "forms" used by school districts, and interacts with 18 internal systems to collect and manage data concerning partners' budgets, expenditures, student enrollment and school district staffing." How does the current SAFS system interact with each of the 18 internal systems to collect and manage data (e.g., integration, manual transfer, batch via Excel, data pipeline, etc.)? Can you please provide examples of the platforms used for the 18 internal systems?

**Answer:** External reporters (e.g., School Districts and other LEAs) have several options for reporting data: formally, they can use the SAFS' GUI, transmit .xsls files via API, or can use a third-party provider (generally WSIPC, although a handful of large districts have created their own systems in house) to enter or transmit data into that platforms front end and have it transmitted via API. Additionally, there are situations (primarily for corrections) in which schools informally send information—including by paper forms—to OSPI staff who enter it into the system. The "18 internal systems" mentioned are largely vertical silos in SAFS that we don't want to replicate as such.

80. **Question:** RE: References, Past Performance: "If your proposal includes hosting on a separate service or platform, you must also provide an additional two references for the hosted service." Does the State have a preference for hosting within OSPI's tenant versus contractor-hosted?

**Answer:** Hosting in OSPI's instance of Azure is not mandatory and no extra evaluation points are awarded for this result. However, it is OSPI's preference to have our data

hosted in our own Azure. As such, solutions that deviate from this preference should consider including justification or context for why their proposal is a more appropriate solution benefiting OSPI.

81. **Question:** RE: RFP, Technical Integration Plan: Under File Expectations, the RFP states that the required format for the Technical Integration Plan is "PDF **and** Excel"? Do vendors have to submit both an Excel version and PDF version of this document?

**Answer:** this is a typo. Please provide your submission as PDF.

82. **Question:** RE: RFP, C.6 Proposed Business Solution: Can the vendors who plan to bid on all three work plans provide one project plan and schedule that addresses all three sections?

**Answer:** the RFP is designed to allow evaluation of each work section independently. Please be sure your submission is provided in such a way that it can be scored according to the RFP and not disqualified as non-responsive for not providing the required files and formats.

83. **Question:** RE: RFP, C.6 Proposed Business Solution: Does the State expect that all three work sections will be developed concurrently if multiple vendors are chosen?

**Answer:** If multiple vendors are selected, the sections may be independently deployed. Our intent is to allow multiple vendors to develop segments of the overall system that can be integrated together through data transfers or data access tools. The work sections may be hosted separately so long as they have structures that allow consistent transmission and transfer of data between the work sections as necessary to achieve the agency's collection, reporting, and calculation requirements.

84. **Question:** RE: RFP Requirements Review Excel Sheet: If the vendor is proposing hosting on OSPI's Azure tenant, will WaTech be responsible for administrating the infrastructure?

**Answer:** No, OSPI is not on the State Government Network. We are on the K20 and WaTech is not responsible for administrating our infrastructure.

85. **Question:** Please clarify the period of performance requirements, broken down by implementation and operations and support. Given a July 1, 2026, start date, does the end date of June 30, 2028 listed in A.8 cover implementation only? RFP refers to a 2-year implementation + 3 years of support, whereas the pre-bid conference indicated 2 years of implementation and 1 year of support.

**Answer:** We anticipate being able to begin work on this project on or soon after July 1, 2026. Development work through implementation and training and other hand-over work is expected to be completed by June 30, 2028. Additionally, the Contractor may be asked at OSPI's discretion to provide ongoing support and potentially further development up to June 30, 2031.

86. **Question:** During the 2025 SAFS RFP, OSPI suggested there would be 2,287 individual External Users from 321 LEAs accessing the overall system, as well as 10-20 OSPI Internal Users. Can you estimate how many unique Internal and External Users will need to access each Work Section (Data Collection, Calculations, Reporting)?

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2,287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users.

87. **Question:** The 2026 RFP specifically cites WCAG 2.0 in the Scope of Work (A.5.iii) and the Sample Contract (I.D). However, last year's Q&A (Addendum 02, Q29) stated that WCAG 2.2 AA was the goal and 2.1 AA was the minimum. Can OSPI clarify if the requirement has been downgraded to 2.0, or if the 2026 RFP should be amended to reflect the higher 2.1/2.2 standards mentioned previously?

**Answer:** WCAG standards should be the most current standards. This will be amended for the RFP.

88. **Question:** The 2026 RFP now requires a preliminary Security Design Review (Section C.5.iii). Is there a specific template or automated tool OSPI requires for this, or should bidders use their own format based on WaTech Policy SEC-01?

**Answer:** We will provide the template for the preliminary Security Design Review via amendment.

89. **Question:** Is there a standardized SDR template OSPI or WaTech prefers?

**Answer:** We will provide the template for the preliminary Security Design Review via amendment.

90. **Question:** Does OSPI have KPIs on current state processes? How long does it take LEAs, ESDs, OSPI staff to perform their respective work efforts?

**Answer:** This information is currently available only anecdotally, via OSPI staff.

91. **Question:** RE: C.6. Business Continuity Plan references organizational continuity and disaster recovery policies, can you provide these?

**Answer:** OSPI's Organizational Continuity and Disaster recovery policies will be provided during project discovery.

92. **Question:** Please clarify C.7. Financial Proposal - Cost Proposal Verification

a. RFP States:

- i. Costs represented on the Cost Proposal Breakdowns must match total costs provided in the Performance Based Contracting Deliverables Schedule in Section C.7.iii.

We believe it should state:

- i. Costs represented on the Cost Proposal Breakdowns must match total costs provided in the Performance Based Contracting Deliverables Schedule in Section C.6.iii (C.6. Proposed Business Solution (Project Plan) - Performance Based Contracting Deliverables Schedule)

**Answer:** Your interpretation is correct.

93. **Question:** Is there an estimate for the number of impacted users by user type?

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2,287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users.

94. **Question:** Will payments be generated by the system or by a third party? If payments are to be generated by the solution, then what ACH/EFT file format is required for electronic payments to school districts?

**Answer:** Payments will not be generated within Sasquatch; instead, the system will send information to the upcoming Workday-based One Washington System, which is in the process of finalizing the format of and encoding for that processing file.

95. **Question:** Does OSPI use encumbrance accounting for apportionments, where funds are committed at calculation time before payment release?

**Answer:** OSPI does not encumber the payments to school districts at the time of calculation. The SASQUATCH system will transmit payment amounts to a different system within OSPI that will utilize the reported data to input the appropriate transactions and transaction codes external to SASQUATCH.

96. **Question:** What specific audit trail requirements does the State Auditor's Office (SAO) mandate for apportionment transactions?

**Answer:** An audit trail of calculation factor changes, data logs for access to files, changes to files and data, and maintaining a history of factors used in calculations is required. There are no accounting entries that occur within SASQUATCH – so data change logs and authorization for changes are the primary audit trail issues.

97. **Question:** RE: Data Migration: Reference: General Question: Can you provide an estimate of the volume of data (e.g., number of years, number of records) to be converted and migrated into SASQUATCH?

**Answer:** The system will need the previous year, current year, and the ability to project the next four years. It is estimated that the annual volume of data is around 41GB. We believe this comprises one billion or more records.

98. **Question:** In what format will the legacy data be made available for migration?

**Answer:** It is estimated that the annual volume of data is around 41GB. One year of data is required to be migrated into Sasquatch. The format of the legacy data will need to be reviewed and confirmed during project discovery.

99. **Question:** RE: System Users: *Reference: General Question*. Please provide the following breakdown:

- How many OSPI staff will access/log into SASQUATCH?
- How many district users will need access to log into the SASQUATCH?

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2,287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users. These numbers may change depending on the structure and capability of the solution.

100. **Question:** RE: Use of Paper Forms for Data Collection and Review: *Reference: RFP Section A.5, p. 15*: Column 1 of the table on page 15 of the RFP titled "Data Collection and Review" states: "...provide also paper forms for select data sets...". Please elaborate on the need to use paper forms.

**Answer:** One of the pathways by which users can report data is via paper versions of the reporting GUI or electronic forms. See, for example, <[Enrollment Reporting](#)>.

101. **Question:** RE: Integrations for each Work Stream: *Reference: RFP Section A.5*: Can OSPI please list the required integrations with external systems (if any) for each work stream listed below and the expected integration type (i.e., API, flat file):

- a) Data Collection and Review
- b) Data Calculations and Estimations
- c) Data Reporting

**Answer:** Our intent is to allow multiple vendors to develop segments of the overall system that can be integrated together through data transfers or data access tools. The work sections may be hosted separately so long as they have structures that allow consistent transmission and transfer of data between the work sections as necessary to achieve the agency's collection, reporting, and calculation requirements. The expectation is that appropriate, best practice integration methods are proposed with this project. Additional integrations are identified in the RFP requirements.

102. **Question:** RE: Number of Users: *Reference: RFP Section A.5*: Can OSPI please provide the number of users that will need to access/log into SASQUATCH for each work stream as listed below:

- 1) Data Collection and Review
  - a) internal OSPI users
  - b) external District users
- 2) Data Calculations and Estimations

- a) internal OSPI users
- b) external District users

3) Data Reporting

- a) internal OSPI users
- b) external District users

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2,287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users. These numbers may change depending on the structure and capability of the solution.

103.     **Question:** RE: Proposal Submissions: *Reference: RFP Section C.1, p. 34:* When and how will OSPI provide the OneDrive link and access for submission of proposals that exceed the 35 MB email limitation? Otherwise, would OSPI allow the submission of proposals via multiple emails labeled 1 of X, 2 of X, etc.?

**Answer:** OSPI can set up a OneDrive for submission at a bidder's request. Bidders who desire a OneDrive link should email the Procurement Coordinator. Alternatively, yes, we will accept multiple emails.

104.     **Question:** RE: Technical Integration Plan: *Reference: RFP Section C.2, p. 35 and RFP Section C.8, p. 46:* The Technical Integration Plan is not listed as a section in the outline provided in Section C.2 (Proposal Overview). Please confirm that the Technical Integration Plan should be included as Section 6 of consultant proposals using the File Expectation formats listed in Section C.8 on page 47 of the RFP.

**Answer:** Yes, the Technical Integration Plan should be included in consultant proposals using the File Expectation formats listed in Section C.8 on page 47 of the RFP.

105.     **RE: Security Design Review:** *Reference: RFP Section C.2, p. 35 and RFP Section C.5, p. 41:* The Security Design Review is not listed as a section in the outline provided in Section C.2 (Proposal Overview). Please confirm that the Security Design Review should be included as a separate Excel file (.xlsx) per the File Expectation formats listed in Section C.5 on page 41 of the RFP, and not as a subsection of the Technical Approach file.

**Answer:** We will provide the Excel template for the preliminary Security Design Review via amendment.

106.     **Question:** RE: References, Past Performance: *Reference: RFP Section C.2, p. 35 and RFP Section C.4, p. 38:* References, Past Performance, is not listed as a section in the outline provided in Section C.2 (Proposal Overview). Please confirm that References, Past Performance should be submitted as a separate PDF file per the File Expectation formats listed in Section C.4 on page 38 of the RFP and not as a subsection of the Management Approach file.

**Answer:** References and Past Performance will be evaluated as part of the Management Approach section of the RFP. Please submit as part of this section.

107.     **Question:** RE: Requirements Review: *Reference: RFP Section C.2, p. 35 and RFP Section C.6, p. 43*: The Requirements Review is not listed as a section in the outline provided in Section C.2 (Proposal Overview). Please confirm that the Requirements Review should be submitted as its own Excel file using Attachment A – Sasquatch Systems Requirements Review, and not as a subsection to each Project Plan file.

**Answer:** Requirements will be evaluated as part of the Proposed Business Solution section of the RFP. Please submit as part of this section.

108.     **Question:** RE: Requirements Review: *Reference: RFP Section C.2, p. 35 and RFP Section C.6, p. 43*: Please confirm whether Consultants should submit a single Attachment A – Sasquatch Systems Requirements Review Excel file or if they should submit up to three separate Requirements Review Excel files—one for each of the Work Sections that contains only the relevant requirements worksheet for that section—using the File Expectation formats listed in Section C.6 on page 43 of the RFP, e.g., labeled with section names.

**Answer:** Please refer to instructions within Attachment A – Sasquatch System Requirements V2. Submit one file with all relevant worksheets completed based on which work sections are included in your proposal.

109.     **Question:** RE: Risk Register: *Reference: RFP Section C.2, p. 35 and RFP Section C.6, p. 43*: Risk Register is not listed as a section in the outline provided in Section C.2 (Proposal Overview). Please confirm that up to three Risk Registers or Tracking Matrices should be submitted as separate files, one for each of the Work Sections included in consultant proposals, using the File Expectation formats listed in Section C.6 on page 43 of the RFP.

**Answer:** Project specific Risks will be evaluated as part of the Proposed Business Solution section of the RFP. Please submit as part of this section.

110.     **Question:** RE: Technical Integration Plan File Expectations: *Reference: RFP Section C.8, p. 47*: Please confirm that the Technical Integration Plan should be submitted as a PDF and not as an Excel file.

**Answer:** We will accept the Technical Integration Plan as either PDF or Excel. It does not need to be both.

111.     **Question:** RE: Exhibit D: Insurance Requirements: *Reference: RFP Exhibit D, Section 24, p. 74*, Items e, f, and g: Items e, f, and g appear to repeat the same insurance coverages in different language and limits required. Please clarify the required limits and/or confirm if OSPI would be open to reducing the Technology Errors and Omissions policy limits in aggregate based on consultant proposals. Specifically:

- In Item e, the limit for Technology Professional Liability (Errors & Omissions) insurance coverage is \$2,000,000 per occurrence and \$4,000,000 general aggregate.
- In Item f, the limit for Technology Professional Liability & Cyber Liability Insurance coverage is a minimum of \$3,000,000 each and every claim and in the aggregate.
- In Item g, there is a requirement for Cyber Risk Liability Insurance with a limit of \$2,000,000 per occurrence and \$4,000,000 aggregate.

**Answer:** OSPI maintains statewide cyber insurance coverage subject to a deductible; however, vendor insurance requirements are independent of OSPI's own coverage. For Exhibit D, vendors are required to carry Technology Professional Liability (Errors & Omissions) and Cyber Risk Liability insurance meeting the minimum limits established in the final contract. A single combined policy covering both areas is acceptable, provided the coverage meets or exceeds the required limits. Vendors may propose alternative coverage limits as part of their response, which OSPI will review for acceptability during evaluation and contract negotiations.

112.     **Question:** RE: Exhibit I: Proposal Checklist: *Reference: RFP Exhibit I: Proposal Checklist, p. 103*: In Exhibit I: Proposal Checklist, the links to the various editable versions of the Letter of Submittal forms at OSPI's website do not seem to work. Please confirm that bidders must use the forms included as part of the RFP announcement package and not the versions at the links. If we need to submit the versions at the links, please provide the updated links and/or forms.

**Answer:** Thank you for bringing this to our attention. Forms can be found on the [OSPI website](#). The forms in the RFP announcement package are the same as those on the OSPI website, but the versions on the website are editable, so we recommend bidders use those.

113.     **Question:** RE: Exhibit I: Proposal Checklist: *Reference: RFP Section C.2, p. 35 and RFP Exhibit I: Proposal Checklist, p. 103*: Exhibit I: Proposal Checklist references a "Consultant Intake Form" to be submitted; however, Section C.2 references a "Contract Intake Form." Please confirm that bidders should submit the "Contract Intake Form" included with the RFP announcement package and that there is no additional "Consultant Intake Form" to be submitted.

**Answer:** Correct, this is a typo that should read Contract Intake Form. There is not a separate Consultant Intake Form.

114.     **Question:** RE: User Licenses in Pricing Sheets: *Reference: Attachment D Cost Breakdown*: If the same internal/external users will use the platform across all three workstreams, and one vendor is delivering two or all three workstreams, how does OSPI want the vendor to price the user licenses and hosting?

**Answer:** Pricing should be listed by user, or in such a way that each work section can be evaluated independently.

115. **Question:** RE: In-Kind Assumptions in Pricing Sheets: *Reference: Attachment D Cost Breakdown:* What is OSPI's expectation for completing the In-Kind OSPI Assumptions tab (Goods and Services section), where line items mirror the Cost Proposal Breakdown tab (e.g., Processing Costs, Hosting Costs)?

**Answer:** If your proposal contains assumptions of in-kind costs or supports that you expect OSPI's to fulfill during and after the project be sure to identify them here.

116. **Question:** RE: Cost Breakdown: *Reference: Attachment D Cost Breakdown:* If one vendor is delivering two or all three workstreams, how does OSPI want the vendor to price and allocate the cross-workstream coordination effort?

**Answer:** The expectation is that the Cost Proposal contain all costs to implement your proposed solution. If there are integration costs associated with working with another vendor because you are not awarded all work sections, those costs need to be captured as well.

117. **Question:** RE: Vision, Goals, Objectives: It feels like the following two phrases are in conflict "will minimize any changes to the current processes of external users, including data input methods and formats" (P. 10) and "will modernize processes for creating and managing workflows" (P. 11). Please describe how many business processes and workflows are expected to be modernized and how many are expected to be left as-is.

**Answer:** We will continue to offer each of the data input methods that are offered today, and make only modest updates (if any) to data elements being reported, while adding more modern handling of the reported data.

118. **Question:** RE: Place of Work: There is a reference to in-person meetings. How many in-person meetings are estimated each month and throughout the project (for project planning and budgeting purposes)?

**Answer:** The expectation is that the majority of the project work can be completed remotely. In person meetings may be required from time to time – but they will be rare and only when deemed absolutely necessary.

119. **Question:** RE: Scope of Work: The RFP mentions collaborating with state staff to develop the transition and training plans. Does OSPI intend for the vendor to take the lead on developing those plans, with the state SMEs brainstorming, then reviewing, and approving the plans? Or does OSPI envision its staff would be more heavily involved in developing the content with vendor guidance?

**Answer:** Vendors should plan on training internal users through a variety of methods and materials to ensure onboarding and transitional success of internal users. Our preferred method for external users is virtual training through a train the trainer model. OSPI expects that its staff and selected school districts and other end users will receive training, including reusable training documentation, and then will train other users. On-

site training is not anticipated. We are looking for a training approach that ensures seamless transition to, and continued success in, the proposed solution.

120. **Question:** RE: Place of Work: Does OSPI expect the vendor to produce training videos, or will the vendor develop the content for the videos that would then be produced by OSPI?

**Answer:** Vendors should plan on training internal users through a variety of methods and materials to ensure onboarding and transitional success of internal users. Our preferred method for external users is virtual training through a train the trainer model. OSPI expects that its staff and selected school districts and other end users will receive training, including reusable training documentation, and then will train other users. On-site training is not anticipated. We are looking for a training approach that ensures seamless transition to, and continued success in, the proposed solution.

121. **Question:** RE: A5: In order to meet WA Tech security requirements, does the vendor need to provide independent penetration testing results, or can these be provided based on internal reviews?

**Answer:** Cybersecurity policies are outlined in the RFP. While WaTech policy SEC-01(Washington State Cybersecurity Program Policy) does not explicitly mandate penetration testing for every system, it does require agencies to implement appropriate security controls, safeguard state data, and support audits and assessments as part of an enterprise risk-management approach. Independent security testing—including vulnerability assessments or penetration tests—is a commonly accepted method for meeting these obligations and verifying that vendor-implemented solutions comply with state security requirements. Bidders may choose to demonstrate compliance with this requirement through security assessments and penetration tests, or other equivalent methods.

122. **Question:** RE: A5: In the event the contract is awarded to multiple vendors, will the WA Tech security design review be conducted on the separate bodies of work, or on all three areas together?

**Answer:** Both. Each system will complete a security design review, including integrations with other systems.

123. **Question:** RE: OCM: In the event the contract is broken into multiple awards for the different bodies of work, will each vendor be required to provide OCM for their associated work?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in an Organizational Change Management role that will be assigned with the responsibility to ensure OCM for the holistic system. This person will be responsible to ensure coordination including addressing issues between vendors as needed.

124. **Question:** RE: Data handling: How long does OSPI anticipate the two systems to be run in parallel? And will OSPI staff be responsible for M&O of the current system during that period?

**Answer:** OSPI will be responsible for maintaining the current system. The systems will likely run parallel through a full apportionment cycle to ensure accurate handoff to the new system.

125. **Question:** RE: Knowledge transfer: There is reference to embedding OSPI staff in various stages of the project, but earlier in the document there is reference to staff needing to continue their existing work. Will there be any 100% assigned resources from OSPI to the project to be involved in the ongoing knowledge transfer? If not 100%, what specific level of OSPI resources should vendors anticipate?

**Answer:** The project is assigned a single Product Owner for all three work sections. OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. The subject matter experts will be available on average 20 to 25% of the week. Some weeks they will have more time available and others less – based on the monthly and annual processing time for normal payments and reporting deadlines. Generally, responses and clarifications will be provided within 24 hours – but some requests may take longer based on the complexity and nature of the request.

126. **Question:** RE: Work requirements: Is there an option to conduct sprint periods that are longer than 2 weeks with bodies of work with high complexity that would benefit from the additional dev/test time?

**Answer:** OSPI will work with each Contractor to establish a sustainable sprint cadence that also delivers working software in each sprint and addresses all prioritized requirements by the end of development.

127. **Question:** RE: Acceptance criteria: This section states that the content must be error free before acceptance. In our experience, states have moved forward with acceptance, with an agreement to resolve a limited amount of remaining issues. Would OSPI be open to negotiating the terms of acceptance with the successful vendor?

**Answer:** Acceptance criteria will be developed during requirements review and refinement, and is subject to the approval of the Project Leadership.

128. **Question:** RE: Acceptance criteria: Will OSPI be engaging an independent validation and verification vendor for code reviews?

**Answer:** While an independent validation and verification (IV&V) is considered a good practice, it is not currently mandatory. However, we reserve the right to engage an IV&V consultant should the need arise. Acceptance of the software will be contingent on functioning software and its ability to meet business requirements. The vendor will be

responsible for addressing recurring issues within the environment, at no additional cost to the support contract.

129. **Question:** RE: Acceptance criteria: There is reference to releasing payment for deliverables after quality is confirmed at the end of the sprint. Does OSPI require bidders to plan for payment deliverables at the end of each sprint?

**Answer:** No, OSPI expects the proposal to be deliverables based, with payments tied to specific milestones or functionality delivered. This does not need to be tied to each development sprint.

130. **Question:** RE: A8: Please elaborate on what is meant by fiscal obligations in this sentence "If OSPI provides a renewal notice to the Consultant, the Consultant shall be obligated to enter into a contract with the same fiscal obligations as the previous Contract year, provided that OSPI and Consultant shall negotiate any revision of additional services or goals beyond those encompassed in the previous Contract." Is this saying pricing will remain the same for new work?

**Answer:** Correct. Your proposal must contain estimates for 3 years of maintenance and operations, and if OSPI provides a renewal notice to the Consultant, the Consultant shall be obligated to enter into a contract with the same fiscal obligations as the previous Contract year, provided that OSPI and Consultant shall negotiate any revision of additional services or goals beyond those encompassed in the previous Contract.

131. **Question:** RE: Section C: There are no page limits stated for the proposal sections. Can OSPI provide any guidance on its expectations regarding the volume of response materials for each response section?

**Answer:** OSPI would like to review information relevant to the proposal, and proposals will be evaluated based on what is specifically requested in the RFP. We expect you to keep your proposals reasonable.

132. **Question:** RE: Deliverables schedule: Please confirm that 15% holdback will be released upon completion of gates as required with section 701 and that gates will be approximately every 6 months as is typical of gated funding projects.

**Answer:** OSPI prefers a deliverables bases contract. Acceptance is defined as the Agency's written confirmation that the deliverables have been completed in full accordance with the requirements, specifications, and quality standards outlined in the Statement of Work. Acceptance will occur only after the Agency has completed its review and verified that all deliverables for the milestone are accurate, complete, functional, and free of material defects. Payment, minus 15% holdback, will not be issued until formal written acceptance is granted. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding gate.

133. **Question:** RE: Deliverables schedule: Please confirm that holdback payment is dependent only on vendor meeting agreed upon acceptance criteria by the agreed upon

dates in the contract, not on OSPI's completion of the gated funding steps with WA Tech and OFM.

**Answer:** This project is under Tier 2 WaTech oversight. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding gate. This would include any funding steps imposed by WaTech and OFM.

134. **Question:** RE: Section 701 Compliance: Is OSPI willing to negotiate the holdback percentage?

**Answer:** No. Holdback percentage is not set by OSPI and is not open for negotiation.

135. **Question:** RE: Minimum Qualifications: Would you please elaborate on what constitutes a "sizeable" financial system (is the definition based on complexity of the system or the dollar amount flowing through the system? As, arguably, the same architecture, features and risks, and attendant requisite IT expertise, could be employed for financial systems handling millions of dollars, or billions of dollars). Also, will project(s) which have significant "financial elements" qualify to meet this requirement? And depending on the responses to the previous questions, if a vendor determines to utilize a subcontractor, would a subcontractor's experience with a "sizeable" financial system meet this requirement?

**Answer:** OSPI expects the solution to be scalable to address the number of users, the number of entities, the dollar values, and the number of transactions required. OSPI expects bidders to provide information and context necessary to provide reasonable assurance that the contractor or subcontractor meets the minimum requirements. We understand that exact size and historic processing experience is not the only factor in determining whether minimum requirements are met.

136. **Question:** Please provide an org chart showing the OSPI business areas/units that will be involved in the project and/or acting as subject matter experts assigned to work with the vendor.

**Answer:** OSPI will share relevant information related to subject matter expert details, org charts, business areas during project work.

137. **Question:** Please confirm that OSPI will purchase software licensees directly and vendor will not be responsible for any licensing costs for this project.

**Answer:** It is the responsibility of the bidder to clarify how all project resources will be procured. If your expectation is that OSPI purchase software licenses, this must be identified in your cost proposal as in-kind assumptions and costs.

138. **Question:** RE: RFP Section A.4: Business Rules Engine - Plain English Formula Definition. The RFP states that users must "view calculation formula displayed with plain English field names and operators" and that the system must be "adaptable to changing input, output, and calculation requirements without additional coding" (Section A.4). Can OSPI provide:

- Examples of current calculation formulas that would need to be displayed in "plain English"?
- The expected level of formula complexity (simple arithmetic vs. conditional logic with nested IF statements)?
- Whether "plain English" means a visual formula builder interface, or if actual natural language input is expected (e.g., "multiply student count by per-pupil rate when district is charter school")?

**Answer:** We will provide a list of all current calculation formulas and expected level of complexity during discovery.

139.      **Question:** RE: RFP Section A.4: 18 Internal Systems Details - Would you please provide the following:

- A list of these 18 systems with their integration requirements (real-time vs. batch, APIs available vs. file-based)?
- Current integration volumes (transactions/day, file sizes)?
- Whether any of these systems are scheduled for replacement during the SASQUATCH project timeline?
- Which integrations are critical for Phase 1 vs. which can be implemented in later phases?

**Answer:** The "18 internal systems" mentioned are largely vertical silos in SAFS that we don't want to replicate as such. Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations. At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor.

As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

140.      **Question:** RE: Attachment\_A\_Sasquatch\_System\_Requirement: Data Migration - Historical Data Retention Period. Requirement 005INT mentions "access to 10–20 years of historical data" while the RFP states data must be "accessible and updateable for several years to support projections and auditing." Would you please clarify:

- The exact number of years of historical data that must be migrated from SAFS?
- Which data elements must be fully migrated vs. archived/read-only?
- Are there any data quality issues in the legacy system that OSPI is aware of that would impact migration?
- What is the acceptable downtime/parallel run period during data migration?

**Answer:** While Sasquatch will need one previous year's data migrated to work with the current year's data, as well as the ability to forecast the next four years of data. Moving

forward, we expect to maintain future years of data archived within the system. Additionally, at this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

141. **Question:** RE: Attachment\_A\_Sasquatch\_System\_Requirement: Calculation Processing Performance Requirements. Requirement 002APP states calculations should complete "ideally within one hour" compared to current 4-6 hour processing times, while requirement 003APP mentions "running multiple calculations in parallel." Would you please provide:

- Specific performance targets (e.g., "all 380 districts processed in under 1 hour")?
- Peak concurrent calculation scenarios (e.g., "5 different legislative scenarios running simultaneously")?
- Current data volumes being processed (number of transactions, data points per calculation run)?
- Whether the 1-hour target is for full statewide calculation or subset calculations?

**Answer:** At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

142. **Question:** RE: Attachment\_A\_Sasquatch\_System\_Requirement: Compliance Tools Integration vs. Replacement. Requirement 005APP states that compliance calculations currently performed in Excel (LAP, High Poverty, PSES, K-3 class size) should be "integrated into the apportionment system." Would you please clarify:

- Should these Excel tools be replicated within the new system, or should the system integrate with modernized versions of these tools?
- Are the business rules for these compliance calculations documented, or will OSPI provide the existing Excel files for reverse engineering?
- How frequently do these compliance calculation rules change?
- Are these calculations required in Phase 1 or can they be implemented in later phases?

**Answer:** OSPI expects some SAFS reports to change. OSPI also expects that there will continue to be certain "edge case" unique situations which will require OSPI staff to create and maintain processes outside of the normal system as needed. OSPI is hopeful

that the new system will limit the amount of data collection, calculation, and reporting that is required outside the system – but recognizes that some will continue.

143. **Question:** RE: RFP & Attachment\_A\_Sasquatch\_System\_Requirement: Custom Reporting vs. Canned Reports - Expected Volume. The RFP references "many canned reports" and requirement 0010PRS mentions "robust ad hoc reporting tools," while Section A.5 indicates a need for "custom report builder." Would you please provide:

- The number of existing "canned reports" that must be replicated in the new system?
- Examples of the most complex current reports?
- Expected volume of ad hoc/custom reports users will create?
- Whether OSPI has a preference for embedded reporting tools (Power BI, Tableau, etc.) vs. custom-built reporting?

**Answer:** At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

144. **Question:** RE: Data Collection Interfaces - Volume and Complexity. Section A.5 states the system must "Create interfaces for districts to transmit data to OSPI electronically (e.g., API, .csv) or (at district's option) via a GUI; provide also paper forms for select data sets." Would you please provide:

- How many distinct data collection forms/interfaces currently exist in SAFS (e.g., F-195, F-197, F-200, F-203, P-223, etc.)?
- Which forms have the highest submission volumes and complexity?
- For API integrations, how many districts currently use programmatic submission vs. manual GUI entry?
- Which "select data sets" require paper form support, and what is the expected volume?
- Are there existing API specifications/documentation from the legacy system that can be provided?

**Answer:** At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

145. **Question:** RE: Data Collection Calendar - Workflow Management: How many distinct data collection periods occur annually (monthly, quarterly, annual, ad-hoc)?

**Answer:** This varies by the current subsystems. Most collections are monthly or annually, but other subsystems are open throughout the year for local education agencies to update data as they need to – with specific dates for deadlines for inclusion in calculations.

146. **Question:** RE: Data Collection Calendar - Workflow Management: Do collection periods vary by district type (e.g., different deadlines for charter schools vs. traditional districts)?

**Answer:** No

147. **Question:** RE: Data Collection Calendar - Workflow Management: What triggers a collection period (legislative calendar, fiscal deadlines, other events)?

**Answer:** Most are determined based on rules and regulations adopted by OSPI. These could change through a rule revision process if needed. Other collection periods are would be established by statute, and these would require a legislative solution to adjust.

148. **Question:** RE: Data Collection Calendar - Workflow Management: How often are collection period overrides needed, and what business scenarios require them?

**Answer:** OSPI may allow districts to submit data late or OSPI may manually enter data for a district after a collection period has ended, if it deems it in the best interest of students or the education system. These are exceptions and are determined on a case-by-case basis.

149. **Question:** RE: Data Collection Calendar - Workflow Management: Should the system support automatic reminders/notifications at different intervals (e.g., 2 weeks before deadline, 3 days before deadline, day of deadline)?

**Answer:** OSPI would not be opposed to this option being included in a proposed solution, but it is not a requirement.

150. **Question:** RE: Attachment\_A\_Sasquatch\_System\_Requirement: Mobile Application Requirements - iOS and Android Compatibility:

**Mobile Functionality Scope:**

- If native/hybrid mobile apps are required, which user types need mobile app access (district staff, OSPI staff, auditors, public viewers)?

**Answer:** Mobile device use is expected for viewing reports, dashboards or system approvals. It is not anticipated that entities will submit data collections via a mobile device.

151. **Question:** What specific functionality must be available on mobile devices vs. desktop-only?

**Answer:** Mobile device use is expected for viewing reports, dashboards or system approvals. It is not anticipated that entities will submit data collections via a mobile device.

152. **Question:** Are there any mobile-specific features required (push notifications, offline capability, camera/file upload, biometric authentication)?

**Answer:** Mobile device use is expected for viewing reports, dashboards or system approvals. It is not anticipated that entities will submit data collections via a mobile device. OSPI is interested in options being presented on features that are reasonable and that would meet user needs.

153. **Question:** RE Data Collection on Mobile: Should school district staff be able to submit data collection forms (F-195, F-197, F-200, P-223, etc.) via mobile devices?

**Answer:** No. Mobile device use is expected for viewing reports, dashboards or system approvals. It is not anticipated that entities will submit data collections via a mobile device.

154. **Question:** RE Data Collection on Mobile: OR is mobile access primarily for viewing reports and dashboards?

**Answer:** Mobile device use is expected for viewing reports, dashboards or system approvals. It is not anticipated that entities will submit data collections via a mobile device.

155. **Question:** RE Current Usage Patterns: What percentage of current SAFS users access the system from mobile devices? Which workflows or features are most commonly accessed from mobile devices in the current system?

**Answer:** Mobile devices are not currently in use with the current system.

156. **Question:** With regard to OSPI's budget, is there any %age divided/assigned between the 2-year Dev contract and the 3-year S&M contract, on the total mentioned amount?

**Answer:** There is no information to share with bidders related to how funds will be divided between development and M&O work for this specific project.

157. **Question:** RE: Attachment A Data Collection: For Digitizing Paper based collections and Online forms, would you please provide a response to the following questions:

- A. For each form (E672, E525, P213, P223YC, UW Enrollment), what fields and validations exist today?
- B. Are districts expected to enter data manually into forms, upload files, or both?
- C. Do any forms contain conditional logic (e.g., show/hide fields)?
- D. What is the submission frequency (monthly, quarterly, annual)?
- E. Do districts require the ability to save drafts before final submission?

- F. Should the new system support bulk uploads or API ingestion from district SIS systems?
- G. Which signature method is required? (Adobe certificate-based, DocuSign, Entra ID signing?)
- H. How many sign-off levels exist (district → ESD → OSPI)?
- I. Should certifications trigger automatic notifications?

**Answer:** At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor.

As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state

158.     **Question:** RE: Attachment A Data Collection: For Transformation of Revenue Forecasting Data, would you please provide a response to the following:

- A. What is the exact mapping logic for regrouping item codes?
- B. Can OSPI provide sample F-203 files (successful vs. error cases)?
- C. How often does the mapping logic change, and who updates it?
- D. Should errors be flagged in real time or during nightly processing?
- E. Which systems currently generate enrollment files?
- F. What file types need to be supported (Excel, CSV, XML)?
- G. What validations are required at the time of upload?
- H. Should the flow run on schedule or only upon submission?
- I. What final report formats are required (Excel, Power BI, CSV)?
- J. Should users be able to filter by district, ESD, school, program, object code?
- K. What configurations must OSPI staff be able to edit without developer assistance?
- L. Should there be role-based approval before configurations go live?
- M. Which formulas or business rules change most frequently?

**Answer:** At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

159.     **Question:** RE: Attachment A Data Reporting: With regard to Data Warehouse Historical storage, would you please provide a response to the following questions: What is the minimum and ideal retention period per data domain (enrollment, personnel, budget, payments)?

**Answer:** Each subsystem has different retention periods based on state records retention requirements.

160. **Question:** Do you need point-in-time snapshots or just year-end totals?

**Answer:** Some interim data is required to be maintained at certain intervals (monthly, quarterly, etc.) and these could be through a “snapshot” or other method to provide an audit trail for specific data.

161. **Question:** How often should warehouse data refresh (real-time, hourly, nightly)?

**Answer:** Nightly would be the minimum, but OSPI is open to more frequent refresh timelines based on the solution provided.

162. **Question:** Is there any legacy logic (queries, macros, R scripts) that must be preserved exactly vs. re-designed?

**Answer:** Depending on the solution provided, there may be a requirement to maintain legacy logic as-is – but that is not OSPI’s preference.

163. **Question:** RE: Attachment A System Requirements :

- A. How will role-based access control be implemented for OSPI, districts, ESDs, vendors, and auditors?
- B. Are there any specific tools already integrated to support multiple file formats (XML, CSV, TIFF, PDF, Web Archive, and Excel), or are additional configurations needed to enable this feature?
- C. How will school-level and program-level validations be enforced?
- D. How will cross-collection validation work (ALE vs P-223)?
- E. How will ingestion failures be reported in human-readable terms?
- F. How will charter school and compensation exceptions be handled natively? Is it already implemented in the legacy application?
- G. How will record retention and destruction follow RIM rules?
- H. How will OneWA / Workday payment integration be validated and reconciled?
- I. Can OSPI business staff edit the rules for F-195, F-200, and other SAFS forms?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement. At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

164. **Question:** RE: Attachment A Technical ALL:

- A. Which data flags require encryption in the system?
- B. Will OSPI have the right to request an independent security audit at any time?

C. How are emergency patches handled outside scheduled maintenance?

**Answer:** The completed system should have the capability of implementing changes to the funding formulas, handling hotfixes, or other critical system needs whenever they are needed. After the system goes live, this work would be managed by the Maintenance and Operations service level agreement, or by in-house staff, depending on the proposed solution. At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

165. **Question:** RE: Attachment A Data Collection:

- A. How will existing calculation logic be extracted from legacy tools (Excel, Access, R scripts) and validated to ensure the new system reproduces current results accurately?
- B. How will the system support accurate multi-year forecasting using historical data, current submissions, and generated reports, including side-by-side comparisons of projections and actuals?
- C. What dependencies on legacy tools (Excel, Access, macros, R scripts, manual workflows) exist today, and how will each be eliminated or replaced in the new system?
- D. How will documentation be embedded and kept current?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement. At this time, we have provided all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

166. **Question:** RE: Attachment A Data Calculation:

- A. How will confidential records be automatically identified and redacted across data collection, calculations, and reporting, including public-facing reports?
- B. Can we recalculate only selected districts or funds?
- C. What is the expected runtime for statewide calculations?
- D. How is carryover recovery calculated and displayed?
- E. Can OSPI staff update or correct data, such as new funds, item codes, or formulas? Will it impact old records as well?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement. At this time, we have provided

all information available to share as part of the RFP process. Additional technical or operational details will be addressed and validated during the discovery phase with the selected vendor. As a reminder, the primary objective of this RFP is to design and deliver a modernized solution—not to recreate or mirror the current siloed systems and workflows. We encourage respondents to focus on innovative, forward-looking approaches that align with the future-state vision rather than the existing state.

167. **Question:** RE: Attachment A Data Reporting: How many years of data are retained and searchable?

**Answer:** Future data must be maintained for the number of years dictated in records retention schedules, typically up to 20 years. Data should be searchable to allow reasonable access for public records requests.

168. **Question:** RE: Attachment A Data Reporting: How do public and internal reports differ in terms of security? Are there specific fields that can be marked for inclusion in reports?

**Answer:** Separate reports are created for public access that eliminate fields that are not subject to public disclosure.

169. **Question:** RE: Attachment A Technical All: Is it mandatory to have the application availability in Firefox?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement.

170. **Question:** RE: Attachment A Data Collection: Can you provide a couple of example dynamic calculations that need to be updated in the UI?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement.

171. **Question:** Is the offline feature needed only for the downloading of the reports?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement.

172. **Question:** Will the user be able to set the checkboxes, codes, etc. directly from the reporting? For the formula(s), can you please provide the example formulas?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement.

173. **Question:** Attachment A UI: Is it possible to share some of the screenshots from the existing application to get an idea of the look and feel?

**Answer:** Questions related to possible solutions for the new system will need to be discussed during discovery and requirements refinement.

174. **Question:** RE: Page 40; WaTech Compliance: "1. Security Design Review - Consultant must complete a preliminary Security Design Review for WaTech as part of the proposal submission process..."  
Can OSPI elaborate on what they wish to see in Bidders' Security Design Reviews? What should these reviews entail, i.e., what information should they contain? Additionally, the "File Expectations" regarding the Security Design Review indicate that the review should be in Excel format; is this correct?  
**Answer:** We will provide the template for the preliminary Security Design Review via amendment.

175. **Question:** Is OSPI amenable to granting an extension to the final deadline, given that the RFP timeline includes Thanksgiving, Christmas, and New Years holidays, all of which inherently present resourcing challenges as team members take time off, etc.?  
**Answer:** No. We have determined based on the questions that the RFP due date is still appropriate.

176. **Question:** RE: Page 43; File Expectations: We wish to confirm the number of expected files for the Proposed Business Solution piece of Bidders' RFP Responses. For example, if Bidders are bidding for all three Work Sections, is OSPI expecting (apart from the requirements contained in Attachment A): three separate Project Plan files - one for each Work Section - along with three separate Project Risks files - one for each Work Section?  
**Answer:** This is explained in the RFP.

177. **Question:** Are there estimated data volumes with high level overview of tables for what data needs to be migrated and updatable?  
**Answer:** One year's data must be migrated into Sasquatch, the estimated data volume for one year is about 41GB.

178. **Question:** Is there an existing data warehouse / data lake infrastructure in place and will continue to be utilized for historical data? Or is this implementation intended to fully replace any historical data warehouse as well?  
**Answer:** This project intends to fully replace and modernize the apportionment systems, including data storage and management.

179. **Question:** Is the allocated budget inclusive of both software costs and implementation and M&O costs?  
**Answer:** Yes.

180. **Question:** The RFP references 18 systems to integrate with. Is OSPI open to potentially phasing some of these secondary systems out to simplify the agencies long-term technical debt?

**Answer:** Yes – where the secondary system is not required by statute, rule, or other business need, OSPI is open to options that create efficiencies. The “18 internal systems” mentioned are largely vertical silos in SAFS that we don’t want to replicate as such.

181.     **Question:** Are resources participating in the implementation efforts that reside outside of the US allowable if they are only accessing non-production environments and non-production data?

**Answer:** No, this project requires all workers to be US based and all work and data remain inside the United States. The RFP will be amended to reflect this requirement.

182.     **Question:** Can OSPI expand on the desired data collection methods from school districts and ESDs given the expressed objective for ease of use “to maintain current import and data collection methods as much as possible”? We are assuming the desire is to maintain existing file upload processes ie. F-195 - Annual Budget Document and enable districts to upload those files for automatic extraction into the new tool? Are there specific individual systems that are targeted to be converted into online forms rather than file upload that is enabled via import?

**Answer:** OSPI expects that most districts and end users will continue to use their existing internal systems to develop required data – and transmit the data to OSPI electronically or manually. We would like the system improvements to take priority in the process – but expect the changes that users need to make to be relatively limited. They may need to change timing of data delivery, format and method of data delivery, method of reconciliations, etc., but we expect there will be relatively minor changes to their underlying work.

183.     **Question:** Is there a sample formula / calculation that could be shared for reference of complexity of the calculations and an approximate number of how many calculations are configured for a given year?

**Answer:** We will provide a sample of calculations via amendment.

184.     **Question:** For the system requirements documents - in the “Vendor Readiness Explanation” field instructions, “Configuration” is not called out as having comments required. However, in the description for “Configuration” it notes an explanation is required. We wanted to confirm if explanations are required for all options, except “Out of the Box”?

**Answer:** This is a typo in the instructions – you are not required to provide an explanation for “configuration”, although you may add one for context if desired. Please provide an explanation for any “customization” required.

185.     **Question:** RE: Attachment B - High Level As-Is Workflows: For “Non-SAFS” identified systems (ie. “Skill Center”, “Bilingual”, “Sped”, etc) it appears there are currently manual processes that bring this data into the Apportionment system. Are there expectations for these to be integrated to the new Apportionment system as part of the

initial implementation via APIs? Or are there priorities for which of these systems should be integrated first?

**Answer:** All data collection systems are expected to be addressed in your proposal. OSPI also expects that there will continue to be certain "edge case" unique situations which will require OSPI staff to create and maintain processes outside of the normal system as needed. OSPI is hopeful that the new system will limit the amount of data collection, calculation, and reporting that is required outside the system – but recognizes that some will continue.

186.     **Question:** The RFP instructions state that the "Bidder will submit a completed copy of the requirements for each Work Section included in their proposal." However, the File Expectations section lists only a single file naming convention: BidderName\_4\_REQUIREMENTS REVIEW.xlsx.

**Answer:** Please refer to instructions within the requirements Excel workbook. You must complete all sheets relevant to your proposed solution, however, you can submit one requirements workbook that contains all your responses.

187.     **Question:** Please confirm that Bidders should submit a single Excel workbook containing the completed tabs for all Work Sections they are bidding on, rather than submitting a separate Excel file for each Work Section.

**Answer:** Please refer to instructions within the requirements Excel workbook. You must complete all sheets relevant to your proposed solution, however, you can submit one requirements workbook that contains all your responses.

188.     **Question:** RE: RFP, SECTION D: EVALUATION AND AWARD Pages 48, 53-54: Can you please clarify the discrepancies in the allocation of points for the evaluation process across different sections of the RFP.

1. Demonstrations (20% vs. 30%)

20%: The "Evaluation Gates" list and the "Evaluation and Scoring" table both assign 20% (or 200 points) to the Interview/Demonstration.

30%: The narrative text describing the "Project Demonstrations" explicitly states: "30% of the total proposal points will be awarded in this section"

**Answer:** There is a typo in section D.1. Evaluation Procedure, under Scoring Notes on page 49 of the RFP. The correct percentage score for each Demonstration work section is 20%. The scoring workflow graphic on page 49 is correct.

2. Technical Integration Plan (10% vs. 20%)

20%: The "Evaluation Gates" list states the Technical Integration Plan is worth 20% of the total points.

10%: The "Scoring Notes", the narrative text, and the "Evaluation and Scoring" table all state it is worth 10%.

**Answer:** There is a typo in section D.1. Evaluation Procedure, In the Evaluation Gates Table on page 48 of the RFP. The correct percentage score for the Technical Integration Plan is 10%. The scoring workflow graphic on page 49 is correct.

189. **Question:** Can you provide an estimate of the number of Agency users who will need access to the system to support all workflows as well as administrator users?

**Answer:** The number of external users varies based on the needs of each LEA. In the last year there were 2,287 individual external users from 321 LEAs with access to SAFS. Internal OSPI users are expected to number between 10-20. Access to the Apportionment System, which calculates and summarizes data from all other SAFS systems, is currently limited to only 2 approved internal users. Users identified by workflows will need to be confirmed based on the proposed solutions and available functionality.

190. **Question:** What weight is given to Washington State government experience versus out-of-state work?

**Answer:** No weight will be given to Washington government experience versus out-of-state work.

191. **Question:** Will OSPI accept healthcare/financial system past performance as demonstrating similar complexity to apportionment systems?

**Answer:** The bidder should make this determination. Include a summary of how each project demonstrates experience or alignment to SAFS functionality.

3. **Question:** What is the scoring weight for veteran-owned business participation?

**Answer:** Section D.2 outlines the distribution of points during the evaluation process, including preferential points for veteran-owned businesses.

192. **Question:** If multiple vendors are awarded different work sections, how will OSPI manage integration?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. In addition, the project Steering Committee will be the authority for unresolved issues or conflicting stakeholder priorities. The project will also have the support of WaTech oversight for guidance related to the technical solution, security, and overall project success.

193. **Question:** Which work section is considered most critical/highest priority?

**Answer:** The work sections are dependent on each other and no single section is most critical. The data collection system feeds accurate data to the calculation hub. The calculation hub distributes data to the reporting section and performs calculations necessary for accurate reporting. The reporting section also feeds information into the

data collection system and calculation hub. Of the three work sections, the most critical for replacement is the calculation hub, as this is the work section that has been the least reliable and is subject to the most agency risk. The other work sections are also in need of replacement due to the need for accurate data and reporting.

194. **Question:** Is Azure cloud hosting mandatory or preferred?

**Answer:** It is OSPI's preference to have our data hosted in our own Azure. However, it is not mandatory and no extra evaluation points are awarded for this result. As such, solutions that deviate from this preference should consider including justification or context for why their proposal is a more appropriate solution benefiting OSPI.

195. **Question:** What is the expected concurrent user count (listed as TBD in RFP)?

**Answer:** Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations.

196. **Question:** What is the anticipated budget range for this project?

**Answer:** As stated in the pre-bid conference, the estimated vendor project budget for implementation is \$9M.

197. **Question:** What is the exact data volume to migrate (GB/TB)?

**Answer:** It is estimated that the annual volume of data is around 41GB.

198. **Question:** Are there WaTech pre-approved vendors or platforms that would streamline compliance?

**Answer:** We are not currently aware of any vendors or platforms that are pre-approved by WaTech.

199. **Question:** How is data currently collected from school districts in SAFS (for example, file uploads, system-to-system interfaces, manual entry)? Are there standard formats or tools in use today?

**Answer:** External reporters (e.g., School Districts and other LEAs) have several options for reporting data: formally, they can use the SAFS' GUI, transmit .xsls files via API, or can use a third-party provider (generally WSIPC, although a handful of large districts have created their own systems in house) to enter or transmit data into that platforms front end and have it transmitted via API. Additionally, there are situations (primarily for corrections) in which schools informally send information—including by paper forms—to OSPI staff who enter it into the system.

200. **Question:** How are funding calculations currently implemented in SAFS (for example, hard-coded logic, rules engines, stored procedures)? What tools or platforms are used to manage and execute these calculations?

**Answer:** Presently, SAFS calculations are performed by hard-coded logic, stored procedures, and outside the system using Excel spreadsheets to make calculations and enter the results into the system.

201.     **Question:** What reporting tools or platforms are currently used to generate reports? Are reports primarily pre-defined, or do users have self-service reporting capabilities today?

**Answer:** Reports are primarily pre-defined, with very limited self-service reporting. The OSPI team can build comparative scenarios in response to legislative requests, but only through considerable manual intervention.

202.     **Question:** Can OSPI provide a high-level overview of the current SAFS technology stack, including application layer, database, reporting tools, and hosting environment?

**Answer:** Regarding this set of questions, the RFP has provided all technical information currently available. Additional details of the current systems will need to be confirmed during discovery and requirements refinement. Our objective is for a modern holistic system, and not a duplication of current efforts.

203.     **Question:** Does OSPI have any preferred, required, or restricted tools, platforms, or technologies that bidders should consider when proposing the SASQUATCH solution?

**Answer:** OSPI takes the lead of WaTech on such matters. In areas where Microsoft offers a product that is a viable option, there is generally a preference to use that product.

204.     **Question:** Is OSPI seeking a commercial rules engine, reporting platform, or low-code/no-code tooling as part of the solution, or is OSPI open to custom-built components provided they meet configurability and security requirements?

**Answer:** OSPI will consider without bias each of these approaches.

205.     **Question:** For this RFP, may bidders use commercial (non-government) clients as references and past performance examples, or are public-sector or government clients preferred or required for evaluation purposes?

**Answer:** Bidders may submit any references for whom the Bidder has completed work. References for whom the bidder completed similar projects will be most helpful to the evaluation team, but no preference will be given.

206.     **Question:** If commercial references are allowed, will experience delivering large-scale commercial financial systems be considered equivalent to public-sector systems when evaluating qualifications and past performance?

**Answer:** Bidders may submit any references for whom the Bidder has completed work. References for whom the bidder completed similar projects will be most helpful to the evaluation team, but no preference will be given.

207. **Question:** Should bidders include costs associated with the parallel run of SAFS and SASQUATCH as part of the base implementation price, or treat this as a separate line item?

**Answer:** Bidders should include all costs to meet the objectives of the project. Bidders should submit costs by work section. Information related to integration costs for multiple sections is also requested in the RFP.

208. **Question:** Are bidders expected to use the specific labor roles and categories listed in the cost workbook, or may bidders add roles if needed to support their proposed solution and delivery approach?

**Answer:** Cost factors will be evaluated holistically by work section for development costs and anticipated maintenance costs. It's important that all costs included in your proposal are outlined in the financial proposal sections.

209. **Question:** Does OSPI expect costs to be aligned to the two-week sprint cadence described in the RFP, or should bidders assume a phase-based cost allocation independent of sprint structure?

**Answer:** We expect a deliverables-based contract, with payments tied to milestones and/or deliverables. We do not expect payments tied to each development sprint.

210. **Question:** For hosting costs, should bidders assume that Azure infrastructure will be provisioned and paid for by OSPI, or should all Azure hosting and related services be included in the bidder's cost proposal?

**Answer:** All costs must be accounted for – if your assumption is that the solution is hosted in OSPI's instance of Azure, be sure to add those costs as In-Kind to that they are captured, and be sure to include all details of what needs to be purchased or configured for your solution.

211. **Question:** Given that travel costs are not reimbursable, should bidders assume zero travel costs in the cost workbook, even for mandatory in-person meetings?

**Answer:** Travel costs are not separately reimbursable. Bidders should assume zero travel costs.

212. **Question:** If the proposed solution includes commercial software or third-party tools, should licensing and subscription costs be included directly in the cost workbook, or identified separately with assumptions?

**Answer:** All costs required to implement the proposed solution must be captured in the cost workbook.

213. **Question:** Should post-implementation maintenance and operations costs be included in the same cost workbook submission, and if so, should they be broken out by year or provided as a single total?

**Answer:** Please see the Cost workbook for instructions and how costs should be provided by year.

214. **Question:** For the optional contract extensions through June 30, 2031, does OSPI expect indicative pricing to be included in the cost workbook, or will pricing for those years be negotiated later?

**Answer:** If OSPI provides a renewal notice to the Consultant, the Consultant shall be obligated to enter into a contract with the same fiscal obligations as the previous Contract year, provided that OSPI and Consultant shall negotiate any revision of additional services or goals beyond those encompassed in the previous Contract.

215. **Question:** Please confirm the single most important measurable outcome OSPI will use internally to determine whether the SASQUATCH modernization is successful at the end of the base contract term.

**Answer:** The system is responsible for the calculation of school district funding distributions making up roughly 90% of each school district's state funding. The accurate calculation and reporting of school district funding distributions based on data collected from school districts and legislatively designated factors is the single most important outcome. This system must be reliable, accurate, updatable, and auditable.

216. **Question:** How will OSPI balance speed of delivery versus long-term configurability when those objectives conflict during implementation?

**Answer:** OSPI expects the deliverables to be completed within the timeframes established within the RFP. OSPI also expects the system to be able to address legislative and other changes as they arise in the future.

217. **Question:** Which stakeholder group's satisfaction carries the greatest weight in determining overall project success: OSPI internal staff, school districts, the legislature, or external auditors?

**Answer:** OSPI will not be using group satisfaction as a determination of project success. OSPI expects the new system to improve the experience of internal staff and school districts. The system will need to have improved audit trails when compared to the current system. OSPI expects the system to be more responsive to legislative requests and requirements than the existing system.

218. **Question:** Does OSPI prioritize minimizing disruption to existing district workflows over introducing improved or redesigned processes, and how will that tradeoff be evaluated?

**Answer:** OSPI expects that most districts and end users will continue to use their existing internal systems to develop required data – and transmit the data to OSPI electronically or manually. We would like the system improvements to take priority in the process – but expect the changes that users need to make to be relatively limited. They may need to change timing of data delivery, format and method of data delivery, method of reconciliations, etc., but we expect there will be relatively minor changes to their underlying work.

219. **Question:** What specific operational or financial risks prompted OSPI to initiate this modernization effort at this time rather than continuing incremental improvements to SAFS?

**Answer:** The current system has become less reliable and there have been a few instances where it was unclear whether the system would meet the funding calculation and distribution timelines necessary to provide accurate funding to end users. Because the technology underpinning the current system is outdated, fully modernizing it is the strongest option for a system responsible for distributing \$15 billion annually.

220. **Question:** How will OSPI measure “agility” in responding to legislative changes once the system is live?

**Answer:** The legislature provides a variety of proposals and final changes to apportionment factors every year through the normal process. OSPI will measure the system’s “agility” through its normal work in responding to legislative requests for proposal impacts—including side-by-side comparisons of the impacts of two or more proposed changes for up to four years in the future—and making the necessary changes to the funding distribution system as required.

221. **Question:** What constitutes unacceptable failure during the first year of production use?

**Answer:** An unacceptable failure would be the system being unavailable for data collection, calculation, or reporting – or the miscalculation or misreporting of funding distributions after the correct factors and data are included in the system for calculation.

222. **Question:** Are there defined success metrics tied to reduction of manual effort, processing time, or staffing burden, and if so, how will they be measured?

**Answer:** There are not defined metrics. However, OSPI expects that the new system will result in staff effort changing to include more focus on data analysis, data quality, and user support and away from data processing functions.

223. **Question:** Will OSPI consider a solution successful if it meets functional requirements but requires ongoing vendor involvement for formula or rule changes?

**Answer:** OSPI would prefer formula and rule changes to be managed and addressed by OSPI staff through clear processes that include appropriate internal controls. Vendor involvement should generally not be required or should be extremely limited. OSPI is open to more vendor involvement regarding changes in the reporting work section than in the data collection and calculation work sections.

224. **Question:** How will OSPI evaluate overall success if multiple vendors are awarded different work sections?

**Answer:** The success of each work section will be evaluated individually, and the overall system will be evaluated for success. Currently, the system is broken up into a

large number of subsystems, so OSPI is accustomed to looking at these systems in isolation to evaluate success of components of the system and the system as a whole.

225. **Question:** Please confirm whether bidders are expected to assume responsibility for all implied requirements necessary to meet stated objectives, even if not explicitly listed in the Scope of Work.

**Answer:** Bidders are expected to meet the stated objectives including the implied requirements in the RFP.

226. **Question:** Are bidders expected to include all testing, remediation, and rework required to achieve acceptance at no additional cost?

**Answer:** Yes, to the extent this work is consistent with the stated objectives in the RFP and the contract award.

227. **Question:** Please clarify which deliverables are mandatory versus illustrative or optional.

**Answer:** The deliverables are mandatory but OSPI remains open to a variety of solutions to achieve the stated objectives and deliverables.

228. **Question:** Does OSPI expect full functional parity with all existing SAFS reports, calculations, and edge-case behaviors, including undocumented practices relied upon by staff?

**Answer:** OSPI expects some SAFS reports to change. OSPI also expects that there will continue to be certain "edge case" unique situations which will require OSPI staff to create and maintain processes outside of the normal system as needed. OSPI is hopeful that the new system will limit the amount of data collection, calculation, and reporting that is required outside the system – but recognizes that some will continue.

229. **Question:** Are bidders permitted to exclude undocumented legacy behaviors that are operationally relied upon today?

**Answer:** OSPI does not intend to continue all undocumented legacy behaviors and expects some undocumented processes to be included in the developed system as necessary to meet the stated objectives. OSPI recognizes there may be unique situations where processes outside the system may be needed and will continue.

230. **Question:** How should bidders interpret requirements that appear only in attachments, diagrams, or workflows but not in narrative sections?

**Answer:** Bidders should consider requirements contained in attachments, diagrams and workflows to be requirements, even when not expressly stated in the narrative sections. However, OSPI is open to discussing changes to workflows and processes with the successful bidder, so long as the stated objectives are met.

231. **Question:** Please confirm whether data migration includes all historical years currently retained in SAFS or only a defined subset.

**Answer:** OSPI expects for one year of historical data to be migrated to the system. OSPI will maintain legacy reports for all other legacy data.

232. **Question:** Are bidders responsible for reconciling discrepancies between legacy SAFS outputs and outputs from the new system?

**Answer:** Bidders will be responsible for ensuring that the new system work sections collect data in accordance with the collection requirements, perform calculations consistent with the calculation requirements, and create reports with the reporting requirements. To the extent that reconciling discrepancies between the legacy outputs and the outputs of the new system are necessary to demonstrate compliance and accuracy, bidders will be responsible to reconcile. No other reconciliations will be required for legacy outputs.

233. **Question:** Does OSPI expect contractors to support parallel operations until OSPI formally authorizes cutover?

**Answer:** For the calculation hub, it is expected that the contractor will support parallel operations. For data collection and reporting, OSPI expects to use curated or sample data to ensure systems work as designed and will not be running parallel operations.

234. **Question:** Are bidders expected to provide post-go-live hypercare support, and if so, for what duration?

**Answer:** Bidders will be responsible for providing post-go-live support throughout the maintenance phase of the project. OSPI expects this support to be primarily to OSPI staff as necessary to ensure the system is meeting the stated objectives and requirements.

235. **Question:** Please confirm whether OSPI mandates a specific system architecture or permits vendor-defined architectures that meet requirements.

**Answer:** OSPI is open to solutions from vendor-defined architectures that meet requirements. Wherever possible, the vendor should include justification or context for why their proposed architecture is the more appropriate solution benefiting OSPI.

236. **Question:** Is OSPI's stated preference for Azure hosting a mandatory requirement or an evaluation preference?

**Answer:** Hosting in OSPI's instance of Azure is not mandatory and no extra evaluation points are awarded for this result. However, it is OSPI's preference to have our data hosted in our own Azure. As such, solutions that deviate from this preference should consider including justification or context for why their proposal is a more appropriate solution benefiting OSPI.

237. **Question:** What performance benchmarks will be used to evaluate calculation runtimes at statewide and district levels?

**Answer:** OSPI does not have predetermined performance benchmarks. Currently, some statewide calculations are required to be run overnight and OSPI is hopeful that the new system will require significantly less time to run calculations and processes – or require certain processes to be run during non-working hours.

238.     **Question:** Are there maximum acceptable processing windows for monthly, year-end, and ad-hoc apportionment runs?

**Answer:** We have existing workflows and processes, but OSPI is open to changes to the number of acceptable processing windows for most data collection, calculation, and reporting elements. For instance, OSPI currently requires school districts to submit year-end financial data by November 15. In the current system, OSPI must wait for all districts to submit data and reports before it begins publishing final year end reports. OSPI is open to a solution that allows for individual or batch processing of reports as data is submitted and validated. That may change the number of processing windows for this data.

239.     **Question:** How will OSPI validate correct implementation of legislative formulas that change mid-year or retroactively?

**Answer:** OSPI will test changes in a test environment and once the changes are validated they would be approved and moved to production for implementation.

240.     **Question:** Are bidders expected to support emergency or mid-cycle hotfixes to calculation logic?

**Answer:** The completed system should have the capability of implementing changes to the funding formulas, handling hotfixes, or other critical system needs whenever they are needed. After the system goes live, this work would be managed by the Maintenance and Operations service level agreement, or by in-house staff, depending on the proposed solution.

241.     **Question:** Please clarify whether near-real-time reporting is required or if batch-based reporting is acceptable.

**Answer:** Real time reporting will be required in certain areas, but batch-based reporting will be acceptable in others. For instance, real time reporting will be necessary for personnel reporting for a school district, but funding distribution processing and reports may be batch-based. OSPI is open to different proposals and options based on the solutions proposed.

242.     **Question:** What data volumes, submission frequency, and peak concurrency should bidders assume?

**Answer:** Peak transaction volume is about 7 billion calculations per hour with peak user access estimated to be 3,000 concurrent users. There are currently 12 SAFS systems with total record count totaling 1 billion. Specifically for the apportionment system our goal is 2 hours or less to complete each submission for calculations.

243. **Question:** Are there defined non-functional requirements for uptime, availability, disaster recovery, and business continuity?

**Answer:** Non-functional requirements are addressed in Attachment A under the Technical All sheet in the requirements workbook.

244. **Question:** Does OSPI require separate development, testing, staging, sandbox, and production environments?

**Answer:** Yes

245. **Question:** Please identify the authoritative source systems for each major data domain integrated with SASQUATCH.

**Answer:** Authoritative data is collected directly from school districts into SASQUATCH, validated within the system, compared to prior years of data, and maintained as the official system of record. As such, SASQUATCH serves as a standalone, authoritative source.

246. **Question:** Are bidders responsible for building and maintaining integrations with all upstream and downstream systems identified in workflows and diagrams?

**Answer:** Bidders will be responsible for ensuring integrations are built for all systems. Maintenance of the integrations may not be the responsibility of the bidder if any change is required due to changes in the other system or systems.

247. **Question:** How will OSPI manage technical dependencies if multiple vendors are awarded different work sections?

**Answer:** As part of your proposal, you will include a technical integration plan outlining how you intend to work with other vendors to integrate all work sections, if you are not awarded all 3 work sections.

248. **Question:** What standards apply to APIs, data exchange formats, versioning, and backward compatibility?

**Answer:** OSPI is currently reviewing preferred agency API standards and does not have policy guidance at this time. Our preference is for REST API standards, and best practice standards that are most appropriate for the system, and the actual configuration and development of APIs will be confirmed during the lifecycle of the project.

249. **Question:** Are there third-party systems outside OSPI's control that present known integration risks?

**Answer:** Yes – but as they are outside OSPI's control, OSPI does not expect the bidder to predict the potential impacts of these risks. An example is the integration with OneWA – the new accounting system being implemented by the state of Washington. OSPI does not yet know the implementation timeline and the potential impacts on SASQUATCH.

250. **Question:** Will OSPI provide test environments and representative data sets for all integrated systems?

**Answer:** OSPI will provide representative data sets. Testing may not be in test environments, but there will be methods established to test integrations without impacting production systems - not all integrated systems may have pre-established test environments.

251. **Question:** How should bidders price and plan for future integrations required by legislative or policy changes?

**Answer:** Bidders should not price and plan for future integrations.

252. **Question:** Please confirm that the majority of work under this contract may be performed remotely.

**Answer:** Yes, work may be performed remotely. It is common practice, and acceptable to OSPI, for the work to be completed remotely or in-person at the OSPI building in Olympia, Washington.

253. **Question:** Please identify any specific project phases or activities that require mandatory onsite presence.

**Answer:** None

254. **Question:** Does OSPI impose any minimum onsite staffing or residency requirements for contractor personnel?

**Answer:** OSPI does not require full-time onsite presence for any leadership during the development of the project. However, it may be necessary for vendors to participate in in-person meetings from time to time.

255. **Question:** Please confirm whether offshore resources are permitted for any portion of the work.

**Answer:** This project requires all workers to be US based and all work and data remain inside the United States. An amendment will be released to clarify this in the RFP's Minimum Qualifications.

256. **Question:** If offshore resources are permitted, please identify which activities are eligible and any applicable restrictions.

**Answer:** Offshore resources are not permitted. An amendment will be released to clarify this in the RFP's Minimum Qualifications.

257. **Question:** If offshore resources are not permitted, please confirm that all work must be performed by personnel physically located within the United States.

**Answer:** This project requires all workers to be US based and all work and

data remain inside the United States. An amendment will be released to clarify this in the RFP's Minimum Qualifications.

258. **Question:** Please confirm whether subcontractors are subject to the same location restrictions as prime contractor staff.

**Answer:** Subcontracts are subject to the same restrictions as prime contractors.

259. **Question:** Do background check and clearance requirements apply equally to remote, onsite, and offshore personnel?

**Answer:** Not applicable.

260. **Question:** Please confirm which party is responsible for hosting the SASQUATCH production environment.

**Answer:** It is OSPI's preference to have our data hosted in our own Azure.

261. **Question:** Please confirm whether OSPI requires hosting within OSPI's Azure tenant, a contractor-managed Azure tenant, or another approved environment.

**Answer:** It is OSPI's preference to have our data hosted in our own Azure. However, it is not mandatory and no extra evaluation points are awarded for this result. As such, solutions that deviate from this preference should consider including justification or context for why their proposal is a more appropriate solution benefiting OSPI.

262. **Question:** Please confirm whether contractor-managed hosting in a U.S.-based cloud environment is acceptable if all security requirements are met.

**Answer:** It is OSPI's preference to have our data hosted in our own Azure. However, it is not mandatory and no extra evaluation points are awarded for this result. As such, solutions that deviate from this preference should consider including justification or context for why their proposal is a more appropriate solution benefiting OSPI.

263. **Question:** Please confirm whether any system data may be stored, processed, or backed up outside of the United States.

**Answer:** No. All system data must be stored, processed, and/or backed up within the United States. An amendment will be released to clarify this in the RFP's Minimum Qualifications.

264. **Question:** Please identify any explicit data residency restrictions applicable to this system.

**Answer:** It is OSPI's preference to have our data hosted in our own Azure. However, it is not mandatory and no extra evaluation points are awarded for this result. All system data must be stored, processed, and/or backed up within the United States. Solutions that deviate from this preference should consider including justification or context for why their proposal is a more appropriate solution benefiting OSPI.

265. **Question:** Please confirm responsibility for infrastructure costs during development, testing, and production.

**Answer:** If the solution will be developed, tested, and deployed within the Agency's Azure-hosted environment, the bidder must include in its proposal the estimated Azure hosting and infrastructure costs the Agency will incur to support the development, testing, and production environments.

While the Agency will provision and manage the underlying Azure tenant, the bidder is responsible for identifying and estimating all required Azure resources (e.g., computer, storage, networking, databases, security services) necessary to support the system throughout the project lifecycle. These estimated costs should be clearly itemized in the proposal to ensure full visibility into expected infrastructure expenses.

The bidder will configure, manage, and support these environments during the project, but the Agency will fund the Azure infrastructure based on the cost estimates provided in the vendor's bid.

266. **Question:** Please confirm who is responsible for ongoing hosting, monitoring, patching, and maintenance after go-live.

**Answer:** The complexity of the post go-live maintenance requirements will be determined by the apparent successful bidder's solution. The goal is a system that allows OSPI staff to adjust and maintain calculations without requiring coding. System maintenance would be governed through a Maintenance and Operations contract.

267. **Question:** Do hosting and infrastructure responsibilities extend through optional contract extensions?

**Answer:** Yes.

268. **Question:** Will OSPI require access to hosting environments for audit, oversight, or monitoring purposes?

**Answer:** Yes.

269. **Question:** Please identify which roles OSPI considers key personnel subject to approval or replacement restrictions.

**Answer:** OSPI considers the following positions to be Key Personnel, subject to Agency approval prior to assignment and subject to replacement restrictions throughout the duration of the project:

- Project Manager
- Lead Developer / Solution Architect
- Business Analyst
- Any project resource expected to perform 80 hours or more of work on the project

270. **Question:** Are named personnel commitments binding for the duration of the contract?

**Answer:**

In the event personnel are removed from this contract for any reason, or if additional personnel are added to this contract, the Contractor is required to provide no less than three (3) qualified resources from which OSPI may choose.

In the event the Contractor personnel are removed from this contract for any reason, the Contractor is required to provide no less than twenty (20) hours of transitional services at no cost to OSPI.

When an accepted resource has performed eighty (80) hours of work within this contract and is removed or leaves for any reason within the term of this contract or any extension, the Contractor must provide twenty (20) hours of transitional services at no additional cost (free of charge).

OSPI may provide twenty (20) hours of on-site training as transition services, or the Contractor may require the exiting resource available at no cost to the Purchaser for mentoring and training the new resource, or any other transitional plan proposed by the Contractor and accepted by the Purchaser.

271.     **Question:** What level of availability should bidders assume from OSPI subject matter experts?

**Answer:** Bidders should assume that subject matter experts will be available 25% of the time on average. There may be weeks where non-project activities take priority, and other weeks where more time may be devoted to the project.

272.     **Question:** Does OSPI require onsite presence for any leadership or governance roles?

**Answer:** OSPI does not require full-time onsite presence for any leadership during the development of the project. However, it may be necessary for vendors to participate in in-person meetings from time to time.

273.     **Question:** Are subcontractor personnel subject to the same vetting and approval requirements as prime personnel?

**Answer:** Yes. Bidders must identify any known or potential subcontractors who will be assigned to the potential contract in their proposal. This will be considered during evaluation. OSPI also has the right to review any proposed new subcontractors, and removal or substitution of subcontractors after the contract commences.

274.     **Question:** Will OSPI evaluate staffing redundancy and continuity risk as part of proposal scoring?

**Answer:** Refer to RFP Section D for scoring criteria.

275.     **Question:** Please confirm whether OSPI imposes any minimum self-performance requirement on the prime contractor.

**Answer:** The Agency does not require the prime contractor to self-perform a minimum percentage of the work. The prime contractor may subcontract any portion of the

scope, provided that all work—whether performed by the prime or its subcontractors—fully meets the project's requirements, standards, and objectives.

Regardless of subcontracting arrangements, the prime contractor remains solely and fully accountable for the performance, quality, security, timeliness, and successful delivery of all work under the contract, and must ensure effective oversight and coordination of all subcontractors.

276. **Question:** What approval process applies to adding or changing subcontractors after contract award?

**Answer:** The Prime Contractor must submit subcontractor additions or changes as requests in the State's business diversity management system, [Access Equity](#) (B2Gnow). The Contract Manager may require additional information or discussion in order to make decision/approval of removal or replacement of, or proposed new subcontractors.

277. **Question:** How will accountability be enforced if performance issues occur at subcontractor interfaces?

**Answer:** Per the Sample General Terms and Conditions, attached as Exhibit D, the Prime Contractor is responsible to ensure that all terms, conditions, assurances and certifications set forth in this Contract are included in any and all Subcontracts. In no event shall the existence of the subcontract operate to release or reduce liability of the Contractor to the Superintendent for any breach in the performance of the Contractor's duties.

278. **Question:** Is the prime contractor fully responsible for subcontractor performance and deliverables?

**Answer:** Yes. Per the General Terms and Conditions, attached as Exhibit D, the Prime Contractor is responsible to ensure that all terms, conditions, assurances and certifications set forth in this Contract are included in any and all Subcontracts. In no event shall the existence of the subcontract operate to release or reduce liability of the Contractor to the Superintendent for any breach in the performance of the Contractor's duties.

279. **Question:** How will OSPI resolve disputes or coordination issues between multiple awarded vendors?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed.

280. **Question:** Will OSPI permit a prime contractor whose primary role is systems integration and governance?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration.

281.     **Question:** Please confirm all data classifications that will be handled within SASQUATCH.

**Answer:** Currently, the system contains some Category 4 data.

282.     **Question:** What specific WaTech security standards must be met prior to production deployment?

**Answer:** The solution must comply with a WaTech security design review and address all findings prior to production deployment. See WaTech policies outlined in Section C.5 Technical Approach of the RFP.

283.     **Question:** Are independent security assessments or penetration tests required?

**Answer:** Cybersecurity policies are outlined in the RFP. While WaTech policy SEC-01(Washington State Cybersecurity Program Policy) does not explicitly mandate penetration testing for every system, it does require agencies to implement appropriate security controls, safeguard state data, and support audits and assessments as part of an enterprise risk-management approach. Independent security testing—including vulnerability assessments or penetration tests—is a commonly accepted method for meeting these obligations and verifying that vendor-implemented solutions comply with state security requirements. Bidders may choose to demonstrate compliance with this requirement through security assessments and penetration tests, or other equivalent methods.

284.     **Question:** Who bears responsibility and cost for remediation of identified security findings?

**Answer:** OSPI intends to follow a clear, risk-based, shared-responsibility model. Remediation ownership should be tied to who controls the affected component and whether the issue stems from a defect vs. a new requirement.

285.     **Question:** Are there restrictions on personnel citizenship or clearance related to data access?

**Answer:** This project requires all workers to be US-based and all work and data remain inside the United States. An amendment will be released to clarify this in the RFP's Minimum Qualifications.

286.     **Question:** How should bidders account for future changes in security or compliance requirements?

**Answer:** OSPI intends to follow a clear, risk-based, shared-responsibility model. Remediation ownership should be tied to who controls the affected component and whether the issue stems from a defect vs. a new requirement.

287. **Question:** What breach notification, liability, and remediation obligations apply to contractors?

**Answer:** This question is addressed in the Sample General Terms and Conditions, included as Exhibit D.

288. **Question:** Please confirm whether this contract is expected to be firm fixed price for all deliverables.

**Answer:** OSPI's preference is for a deliverables-based contract.

289. **Question:** How will OSPI handle scope growth driven by legislative or policy changes during the contract term?

**Answer:** OSPI does not anticipate scope growth driven by legislative or policy changes. While requirements regularly change in terms of calculation factors, it is extremely unusual for the legislature or executive changes to be made in the overall scope of basic education funding distributions due to legal requirements and restrictions by the courts.

290. **Question:** Are payments tied to milestone acceptance, and if so, how is acceptance defined?

**Answer:** Yes, OSPI prefers a deliverables-based contract, per RFP Section C.6. Acceptance is defined as the Agency's written confirmation that the deliverables have been completed in full accordance with the requirements, specifications, and quality standards outlined in the Statement of Work. Acceptance will occur only after the Agency has completed its review and verified that all deliverables for the milestone are accurate, complete, functional, and free of material defects. Payment, minus 15% holdback, will not be issued until formal written acceptance is granted. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding gate.

291. **Question:** What constitutes acceptance for complex deliverables such as calculation engines or data migration?

**Answer:** Acceptance is defined as the Agency's written confirmation that the deliverables have been completed in full accordance with the requirements, specifications, and quality standards outlined in the Statement of Work. Acceptance will occur only after the Agency has completed its review and verified that all deliverables for the milestone are accurate, complete, functional, and free of material defects. Payment, minus 15% holdback, will not be issued until formal written acceptance is granted. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding gate.

292. **Question:** Will OSPI consider alternative pricing models such as phased or outcome-based pricing?

**Answer:** OSPI's preference is for a deliverables-based contract. However, other contract pricing models will be considered.

293.     **Question:** Are there funding constraints that could delay payments or reduce scope?

**Answer:** This project is under Tier 2 state oversight through WaTech, including 701 gated funding. Projects must complete agreed upon deliverables before payment is released.

294.     **Question:** How will OSPI evaluate cost realism and completeness?

**Answer:** The Agency will evaluate cost proposals for both completeness and realism. Completeness will be assessed by verifying that all cost elements necessary to perform the work outlined in the SOW are included. Cost realism will be evaluated to determine whether proposed costs reflect a clear understanding of the project requirements and are adequate to successfully perform the required work.

295.     **Question:** Who has final authority to approve requirements, designs, and scope changes?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. In addition, the project Steering Committee will be the authority for unresolved issues or conflicting stakeholder priorities. The project will also have the support of WaTech oversight for guidance related to the technical solution, security, and overall project success.

296.     **Question:** How will OSPI manage decision latency to avoid schedule impacts?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. In addition, the project Steering Committee will be the authority for unresolved issues or conflicting stakeholder priorities. The project will also have the support of WaTech oversight for guidance related to the technical solution, security, and overall project success.

297.     **Question:** What escalation paths exist for unresolved issues or conflicting stakeholder priorities?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. In addition, the project Steering Committee will be the authority for unresolved issues or conflicting stakeholder

priorities. The project will also have the support of WaTech oversight for guidance related to the technical solution, security, and overall project success.

298. **Question:** Will OSPI designate a single empowered product owner?

**Answer:** Yes, this project has one OSPI product owner overseeing all work sections.

299. **Question:** How will governance effectiveness be measured during execution?

**Answer:** All governance processes, roles, responsibilities, and decision making procedures will be fully defined in the Project Charter and detailed further in the Project Management Plan (PMP). These documents will outline the governance structure, meeting cadence, escalation paths, reporting requirements, risk and issue management processes, and the methods by which governance effectiveness will be measured throughout project execution. The Agency and contractor will jointly develop and maintain these documents to ensure clear, consistent, and transparent governance for the duration of the project.

300. **Question:** Please identify which milestones are fixed versus negotiable.

**Answer:** Each work section is dependent on budget and school cycles. There is flexibility on when each work section is moved into production, as there are certain times of the year that are more conducive to transitioning to each work section.

301. **Question:** What dependencies exist on legislative calendars or budget cycles?

**Answer:** This project is subject to WaTech Tier 2 oversight and 701 gated funding compliance. Projects must complete agreed upon deliverables before payment is released.

302. **Question:** How will delays caused by external data quality issues be handled?

**Answer:** OSPI does not expect to change the data requested from school districts and other users significantly. It is typical that some data quality issues exist in the current system, and SASQUATCH is expected to meet stated objectives and requirements with the normal data quality issues that exist today. OSPI expects that data quality issues will diminish as more user based edits and validation processes are established within SASQUATCH, minimizing the opportunity for delays.

303. **Question:** Are there penalties or remedies associated with schedule slippage?

**Answer:** This project is under Tier 2 state oversight through WaTech, including 701 gated funding. Payment for accepted deliverables, minus 15% holdback, will not be issued until formal written acceptance is granted. Holdback payments will be released upon satisfactory completion and approval of all deliverables within each funding gate.

304. **Question:** How will OSPI determine readiness for production cutover?

**Answer:** OSPI expects to use existing data and systems to validate and verify data collection, calculations and reporting accuracy in SASQUATCH. OSPI also expects

that power users of the system will support OSPI efforts to confirm calculations and reporting accuracy. Once OSPI determines accuracy, validations, and completeness, production will be authorized at a time that is appropriate based on state and local requirements and needs.

305. **Question:** Please confirm whether demonstrations are scored independently of written proposals.

**Answer:** Demonstrations will be evaluated based on the provided scenarios and awarded points as outlined in the RFP.

306. **Question:** How will OSPI normalize scores across bidders proposing different work section combinations?

**Answer:** As outlined in the RFP, each work section will be scored independently to allow for the normalization of all evaluations. See Section D: Evaluation and Award for more information.

307. **Question:** Are certain evaluation criteria weighted more heavily than others?

**Answer:** The breakdown of evaluation points by proposal section is available in Section D: Evaluation and Award. Proposals must meet minimum criteria to move forward through each evaluation section.

308. **Question:** How will OSPI treat innovative approaches that deviate from implied legacy workflows?

**Answer:** The goal is to modernize the apportionment suite of systems into a cohesive, integrated system. The expectation is that proposed solutions will present innovative approaches. We are not trying to replicate the current siloed systems as-is.

309. **Question:** Will reference checks be conducted before or after scoring?

**Answer:** Reference checks are expected to be conducted as part of the evaluation process. Bidders may expect that their references will be contacted and evaluated prior to any invitation to demonstrate their proposed solutions.

310. **Question:** Who will own intellectual property developed under the contract?

**Answer:** OSPI expects to own the developed solution and any intellectual property to the fullest extent permitted by law. Refer to the Copyright provision in the Sample General Terms and Conditions, included as Exhibit D.

311. **Question:** Are contractors permitted to reuse non-specific components or frameworks developed during performance?

**Answer:** OSPI expects to own the developed solution and any intellectual property to the fullest extent permitted by law. This includes retaining ownership rights of system code and data.

312. **Question:** What liability caps apply to financial errors or calculation inaccuracies?

**Answer:** Contract liability caps are addressed the Insurance provision in the Sample General Terms and Conditions, included as Exhibit D.

313. **Question:** Under what conditions may OSPI terminate the contract for convenience?

**Answer:** This provision gives OSPI the option to terminate for any reason other than cause/default.

314. **Question:** Are there indemnification obligations specific to financial or data-related harm?

**Answer:** Refer to the Indemnification provision in the Sample General Terms and Conditions, included as Exhibit D.

315. **Question:** What documentation is required to enable OSPI or a successor vendor to operate the system independently?

**Answer:** OSPI will require documentation necessary to maintain the system and user documentation necessary to operate and update the system independently. The extent of that documentation depends on the unique solutions that are proposed and implemented through the contract.

316. **Question:** Are contractors required to provide knowledge transfer at contract conclusion?

**Answer:** Yes, knowledge transfer is stated multiple times in the request for proposal.

317. **Question:** How will continuity be ensured if the contractor exits after the base term?

**Answer:** Knowledge transfer is an important deliverable of this project to ensure continuity and seamless operations of the Apportionment system.

318. **Question:** Will OSPI require escrow of source code or configuration artifacts?

**Answer:** OSPI expects to own all intellectual property, including the source code, configuration artifacts, deployment scripts, and documentation. Your proposed solution should ensure OSPI holds full ownership, and has the rights and materials needed to maintain, modify, or transition the system. Refer to the Copyright provision in the Sample General Terms and Conditions, included as Exhibit D.

319. **Question:** Which obligations survive contract termination?

**Answer:** Contract termination is addressed in the provided sample General Terms and Conditions (Exhibit D).

320. **Question:** How should the system handle late or missing district submissions without delaying statewide payments?

**Answer:** The system should allow for statewide payments with late or missing data. Late or missing data may adversely impact the specific district with missing data – but should not adversely impact other districts or delay payments for other districts. This is true for financial data in budgets, financial statements, personnel reporting and enrollment reporting as well as factors that impact payment calculations.

321. **Question:** What is the expected response when calculated outputs conflict with legislative intent?

**Answer:** Legislative intent is not a clear standard. Legislative budget language and statutory language as interpreted by OSPI staff will be used to evaluate calculated outputs. If calculated outputs differ from expectations, OSPI staff will work to identify the differences and make changes to the factors or system calculations to address the discrepancy. The system should enable OSPI staff to analyze the data, identify discrepancies, and make changes as needed to comply with budget and statutory requirements.

322. **Question:** How will historical errors discovered post-migration be handled?

**Answer:** The system must have a method to allow prior period manual adjustments to be added for errors or irregularities that are identified by the user, OSPI, or an auditor. Errors are adjusted to current year allocations – not adjusted against prior year allocations.

323. **Question:** Are bidders expected to design for audit challenges and legislative inquiries?

**Answer:** No

324. **Question:** What contingency plans are required for system outages during critical payment periods?

**Answer:** The system must have the ability to generate a payment based on prior saved month data adjusted by the monthly payment percentage as outlined in statutory language. There may be a variety of options and solutions that would allow for this contingency among the different proposals.

325. **Question:** Are there any requirements intentionally omitted from the solicitation that bidders should anticipate?

**Answer:** No

326. **Question:** How will OSPI treat assumptions made by bidders where the solicitation is silent?

**Answer:** OSPI expects the vendor(s) to conduct discovery with the OSPI project team to mitigate and clarify any assumptions prior to, and during, development.

327. **Question:** Will OSPI issue binding interpretations in response to clarifying questions?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. In addition, the project Steering Committee will be the authority for unresolved issues or conflicting stakeholder priorities. The project will also have the support of WaTech oversight for guidance related to the technical solution, security, and overall project success.

328. **Question:** How will conflicting interpretations between bidders be resolved?

**Answer:** OSPI will either hire a staff person or a separate contractor to serve in a project management role that will be assigned with the responsibility to ensure system integration. This person will be responsible to ensure coordination including addressing disputes and coordination issues between vendors as needed. In addition, the project Steering Committee will be the authority for unresolved issues or conflicting stakeholder priorities. The project will also have the support of WaTech oversight for guidance related to the technical solution, security, and overall project success.

329. **Question:** Will OSPI publish all questions and answers verbatim to all bidders?

**Answer:** Yes. Per RFP Section B.8., the Consultant questions and Agency answers will be published on the [OSPI website](#) and [WEBS](#).

330. **Question:** Can OSPI confirm that answers provided during Q&A become part of the solicitation?

**Answer:** Yes. Per RFP Section B.8., the published Consultant questions and Agency answers, and any other pertinent information, shall be considered an addendum to the RFP.

331. **Question:** Will OSPI allow revisions to proposals based on clarifications issued late in the Q&A process?

**Answer:** Bidders may revise proposals or previously submitted proposal up to the due date listed in the RFP.

332. **Question:** How will OSPI ensure equal treatment if material clarifications are issued close to the submission deadline?

**Answer:** All bidders are provided the same information, and all questions/answers are posted to WEBS and OSPI's website for all bidders to review and consider within the same timeline. If OSPI feels clarifications are material, we may choose to extend the RFP's due date, in such case, and amendment would be issued.

333. **Question:** Does OSPI reserve the right to modify scope based on Q&A responses?

**Answer:** Yes. Per RFP Section B.8., the published Consultant questions and Agency answers, and any other pertinent information, shall be considered an addendum to the RFP.

334. **Question:** Please confirm that bidders may rely on OSPI's written Q&A responses in pricing, staffing, and risk allocation.

**Answer:** Yes