



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Department of Purchasing
Michael J. Woodall, CPPO, Purchasing Agent
813/ 794-2221 Fax: 813/ 794-2111
727/ 774-2221 TDD: 813/ 794-2484
352/ 524-2221 e-mail: mwoodall@pasco.k12.fl.us

December 18, 2012

MEMORANDUM

TO: Honorable School Board Members

FROM: Michael J. Woodall, CPPO, Purchasing Agent *MJW*

SUBJECT: Negotiated Contract: The Center for Educational Leadership and Technology (CELT) for Local Instructional Improvement System (LIIS) and Student Information System (SIS)

As noted to the Board at the workshop immediately following the Board meeting on December 4, 2012, the Florida Department of Education is requiring all Districts to implement an LIIS that meets the stakeholder needs regarding access and use of data to inform instruction in the classroom. The Minimum Standards establish a baseline of features and functionality to meet Florida's vision for a student-centered environment. The LIIS is required by the Florida Department of Education for all districts. Please see the attached memo from Dr. Peggy Jones, Director for Research and Evaluation Services, which provides detailed information regarding both the LIIS and SIS.

On September 18, 2012, Board approval was granted to allow the Purchasing Department and the Research & Evaluation Department to negotiate a contract with CELT. Such negotiation is permitted by Florida Administrative Rule 6A-1.012(11). The contract with CELT, including a firm fixed price of \$185,000 for their consulting services, is attached for your approval. Funds for this project are available in the Race to the Top (RTTT) grants for the 2012-2013 and 2013-2014 school years. The terms and conditions have been reviewed and approved by Ms. Nancy Alfonso, Board Attorney.

Please note that the timeline reflected in the contract is a very preliminary draft, and will be finalized after further detailed discussions between CELT and the District. CELT will not perform any billable work before Board approval of the contract has taken place. Please contact Dr. Jones or me at your earliest convenience if you have any questions or concerns.

MJW/az
Attachments

Date/Time: December 12, 2012 09:52:00



DISTRICT SCHOOL BOARD OF PASCO COUNTY

Kurt S. Browning, Superintendent of Schools

7227 Land O' Lakes Boulevard • Land O' Lakes, Florida 34638

Research and Evaluation Services Department
Peggy Jones, Ph.D., Director
813/794-2343 Fax: 813/794-2116
727/774-2343 TDD: 813/794-2484
352/524-2343 email: pejones@pasco.k12.fl.us

Memo

Contact: Peggy Jones, Ph.D.
813-794-2343

DATE: December 18, 2012

TO: Michael J. Woodall, CPPO, Purchasing Agent

FROM: Peggy Jones, Ph.D., Director Research and Evaluation Services *pej*

SUBJECT: **Local Instructional Improvement System (LIIS) and Student Information System (SIS)**

Florida envisions a student-centered school environment where every district in Florida is equipped with a Local Instructional Improvement System (LIIS) that meets stakeholder needs for access to and use of data to inform instruction in the classroom, operations at the school and district, and research. The Minimum Standards establish a baseline of features and functionality the system must have to meet Florida's vision for a student-centered environment. The LIIS is required by the Florida Department of Education (FDOE) for all districts by June 2014.

A student information system (SIS) is a unified software application that manages student information and student records for an educational organization. Student information systems typically track data elements such as test scores, grades, credits, class rank, attendance, health information, demographic information, discipline records, schedules, and academic history. Another key component of student information systems is summarizing and reporting data to stakeholders. This includes everything from direct reporting to parents and students via report cards and transcripts all the way to mandated state and federal data collection systems.

The legacy system presently utilized by DSBPC is Total Educational Resource Management System (TERMS) and was originally installed in 1992. The company has been purchased by CrossPointe, LLC. Increased reliance on student performance data for educational decision

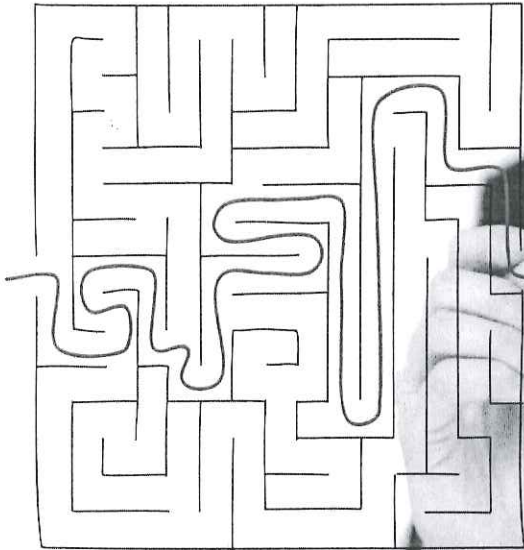
making at the school and classroom level demands that student information systems be integrated, easy to use, current, and flexible. Modern Student information systems are web based and provide end users quick access to key student data. While the Pasco TERMS system has provided robust storage of student information for years, it does not provide the benefits that are inherent in modern SIS applications.

The district is seeking a consultant to provide the following services:

- Business Process Review
- Needs Assessment
- Technical Specifications
- Request for Proposal (RFP) Development
- Solution Review and Selection
- Vendor Selection Process
- System Implementation
- Just-in-Time Training
- Project Management
- Going Live, Post Production and System Optimization

The staff has an immediate need to proceed with a Needs Analysis Study, Vendor Selection Process and System Implementation. On September 18, 2012, the Board gave the Research and Evaluation Services Department permission to negotiate for these services with CELT. The final negotiated contract is attached for your approval at this time. As consultants, CELT negotiates contracts with firm/fixed prices based on a customized schedule of deliverables. A contract of this nature allows the District to terminate the relationship at any stage of the process if the services of CELT are no longer needed. Funds for the contract in the amount of \$185,000.00 are available in the Race to the Top (RTTT) grant for the 2012-2013 and 2013-2014 school years.

If you need additional information please contact me at your earliest convenience.



District School Board of Pasco County

Proposal for Procurement Assistance

Student Information System / Instruction Improvement System

Submitted by:

Center for Educational Leadership and
Technology (CELT)
65 West Boston Post Road,
Suite 200
Marlborough, MA 01752
Tel. (508) 624-4474

November, 2012

CONTRACT REVIEWED
AND APPROVED:
NW 12.2.12





Table of Contents

I. Table of Contents	i
II. Project Objective	1
III. Organization of the Proposed Project Teams	3
IV. Scope of Work	5
V. Acceptance.....	18
VI. Resumes of Key Project Staff.....	19
VII. Terms and Conditions.....	22

CONTRACT REVIEWED
AND APPROVED:
AW 12.7.12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

Project Objective

The District School Board of Pasco County (DSBPC) desires to replace its current Student Information System (SIS) with a state-of-the-art contemporary application. In addition, DSBPC seeks to procure a new Local Instructional Improvement System (LIIS) to meet its Race to the Top commitments. The DSBPC has asked the Center for Educational Leadership and Technology (CELT) to provide technical consulting assistance to the school district during specific phases of the solicitation process for the systems.

CELT will assist the District School Board of Pasco County in the overall SIS/LIIS needs assessment, develop a comprehensive SIS/LIIS RFP, oversee the public procurement process, assist DSBPC in the overall RFP evaluation process, coordinate the formal SIS/LIIS demonstrations for the vendor finalists, summarize the results of the RFP evaluation, vendor finalists demonstrations and 5-year cost analysis and assist the district in vendor contract negotiations. Following the SIS/LIIS contract approval, CELT will assist the DSBPC in SIS/LIIS project implementation effort to successfully conclude the project.

The procurement phase of the SIS-LIIS will take approximately twelve months followed by a two year implementation process.

Benefits of the new Student Information System/Local Instructional Improvement System

The new SIS/LIIS will enable DSBPC to meet its goals to:

- Fulfill its commitment the Florida Department of Education Race to the Top participation
- Maximize student achievement by providing, accurate, real-time information to support data-driven decision making processes
- Monitor student performance in real-time
- More effectively manage school and district operations
- Facilitate communication with teachers, students, and parents
- Meet the ever-changing local, state, and federal reporting requirements

The new SIS/LIIS will be an enterprise, district-wide solution that performs district, school, and classroom student information management in real-time for all educators, students, and parents throughout the district.

SIS/LIIS capabilities for teachers will include web-based and mobile access options including:

- Teacher access to gradebook, attendance, assessment and parent communications
- Both traditional and standards-based teacher gradebook that automatically updates the SIS/LIIS in real-time and provides parent and student views of student progress
- Comprehensive student academic profiles and their progress in their classes
- Mobile Profile for hand-held devices





District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

- Workflow notifications to teachers of newly enrolled and withdrawn students and automatically updated classroom gradebooks and attendance rosters
- Customized class and student academic reports
- Access to instructional resources
- Access to professional development

For parents and students, the new SIS/LIIS system will provide web-based tools for communication with students' teachers by a:

- Secure Web-based parent portal to view their students' progress in their courses, as well as the status of the student's graduation requirements
- Secure Web-based student portal will permit students to view their current attendance history, classroom assignments, classroom progress reports and grades, and the status towards their graduation requirements
- Scripted Email Notifications to parents and students based upon events in school
- Ability for students to receive teacher and guidance counselor recommendations on next year's courses as well as entry of student of course requests for the coming school year.
- Access to standards and instructional resources.

School administrators, front office staff, counselors, and teachers will have applications tools to manage:

- Family census and student enrollment information
- Class scheduling and online real-time class section drops and adds
- Period-by-Period and Daily Attendance
- Student discipline records
- Student health information restricted on proper security clearances
- Programs and Services
- English Learners
- Assessment and Test History
- Report Cards (both traditional and standards-based)
- Transcripts
- Real-time student graduation and degree audit status

A SIS/LIIS provides all members of the learning community with a comprehensive and secure management system that allows the flow of information on demand among the many people who must work together to ensure the success of each student. It is not merely a software program, but rather a critical organizational resource that enables staff to work cooperatively, collaboratively, and interdependently in order to enhance learning, increase productivity, and improve accountability.



Organization of the Proposed Project Teams

The organizational structure for this RFP procurement assistance project will have corresponding project managers from the DSBPC and CELT.

CELT will utilize Greg Palmer and Don Ginder as the co-project managers to supervise the project and work collaboratively with the project manager appointed by DSBPC. As project managers, Greg and Don will be responsible for coordinating approved work schedules, providing periodic reporting to the DSBPC steering committee, and timely delivery of all documents required for the completion of the project.

Project management responsibilities will include:

- Finalizing project work plans, milestones, and deliverables for the work order
- Providing oversight and communications for project group activities
- Developing and maintaining a comprehensive budget and financial plan
- Providing periodic status reports
- Recommending corrective actions to maintain project timeline and scope
- Helping establish reporting procedures for the project
- Coordinating the activities of DSBPC personnel during each phase of the SIS/LIIS Procurement Project

Every effort will be made to align the project organizational structure to the established DSBPC structure.

Sub-project teams will be formed to guide subject matter and specific project tasks and activities. Selected team members will have specific expertise in dealing with the identified responsibilities, activities, and deliverables for that team.





District School Board of Pasco County
SIS – IIS Procurement Project Organizational Chart

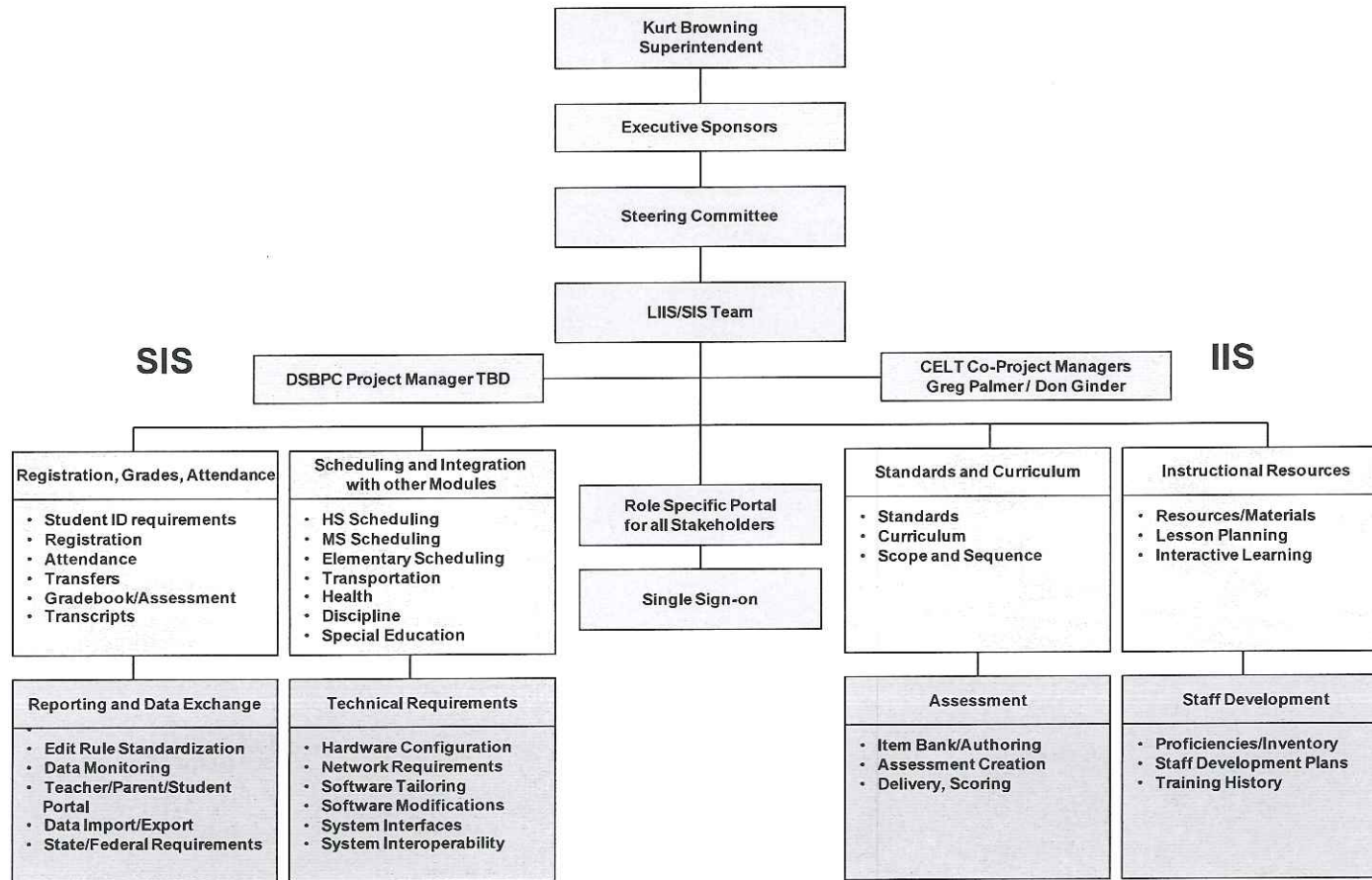


Figure 1: Project Organizational Chart

Approved 12-7-12
 CONTRACT REVIEWED
 AND APPROVED:



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

Scope of Work

PHASE 0 - PROJECT PLANNING AND ON-GOING MANAGEMENT

CELT will utilize a disciplined approach in addressing the steps necessary to complete a comprehensive SIS/LIIS needs assessment and to prepare a final Request for Proposal for the SIS/LIIS acquisition.

CELT will work with the District School Board of Pasco County to:

- Establish the project management and oversight procedures for the SIS/LIIS procurement
- Identify documents and information that will serve as background material for the preparation of the SIS/LIIS RFP
- Jointly identify appropriate DSBPC staff to serve on the SIS/LIIS Selection Committee
- Discuss and delineate roles and responsibilities for:
 - CELT project team members
 - District's project team members, including DSBPC Project Managers
- Finalize project work plan, including:
 - Milestone dates for submitting project deliverables

Deliverable: Student Information System/Local Instructional Improvement System Procurement Project Work Plan with Timeline

PHASE I - SIS/LIIS NEEDS ASSESSMENT

The SIS/LIIS Needs Assessment is designed to gain an understanding of the current landscape, issues and problems, as well as the needs of all district departments that utilize the student information system and the local instructional improvement system. Information is gathered through the process of interviewing representatives from information services, curriculum and instructional services, student services, research and evaluation, instructional media technology services, and staff development departments and various building level personnel including elementary, middle, and high school administrators, teachers, and clerical staff.

CELT will work with the DSBPC project managers to identify and recommend district staff to take part in the SIS/LIIS needs assessment. DSBPC will assist in developing an interview and focus group schedule for the conduct of the district SIS/LIIS needs assessment.



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

- Conduct key stakeholder interviews and focus groups (including parent and student groups) to identify the needs of all school and school district constituents
- Review the SIS/LIIS Functional Requirements Document with DSBPC subject matter specialists to ensure that all district needs are incorporated.

Deliverable: Student Information System/Local Instructional Improvement System Functional Requirements Document

PHASE II - SIS/LIIS RFP DEVELOPMENT

During the SIS/LIIS needs assessment, CELT staff will work collaboratively with the DSBPC Project Manager to obtain information from the district to be used in the RFP to describe a general overview of the district including, demographics, operations of the current student information system and current hardware, software, and network infrastructure. In addition information will be obtained to highlight the district's vision for the new student information system and local instructional improvement system in the future network architecture environment.

CELT will complete the development of the SIS/LIIS RFP including the following sections:

- The new application technical operating environment
- The interfacing of both SIS and LIIS with currently operational DSBPC systems
- Major RFP topics and questions that the SIS/LIIS vendors will be asked to respond in writing within their proposals include:
 - Firm Qualifications
 - Project Management Approach
 - Proposal Technical Environment
 - Proposed Solution Approach
 - Proposed Approach to SIS/LIIS Enhancements and Customizations
 - Testing Strategy
 - SIS/LIIS Data Conversion Strategy
 - SIS/LIIS Software Support and Maintenance
 - Security Strategy
 - Training Approach

CONTRACT REVIEWED
AND APPROVED:
[Signature] 12-7-12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

- The Five-Year Total Cost Forms for the SIS/LIIS

CELT will conduct a final review of the SIS/LIIS RFP with DSBPC staff to ensure that the RFP conveys clear instructions for prospective vendors to successfully respond to the SIS/LIIS solicitation.

Deliverable: Student Information System/Local Instructional Improvement System Request for Proposals Document

PHASE III - SIS/LIIS PROCUREMENT PROCESS, SIS/LIIS RFP EVALUATION, FINALISTS DEMONSTRATION

All tasks in Phase III will be performed in advice and consultation with the District School Board of Pasco County's Purchasing Department.

PHASE IIIA - SIS/LIIS RFP PRE-BIDDERS' CONFERENCE

1. Assist DSBPC with the SIS/LIIS Pre-Bidders' Conference

Once the SIS/LIIS RFP is publically released, CELT will assist DSBPC staff in conducting a pre-bidders' conference. SIS/LIIS vendors desiring to bid will be offered an opportunity to learn more about DSBPC's new SIS/LIIS procurement and can then ask questions for further elaboration and clarification to the DSBPC. Tasks include:

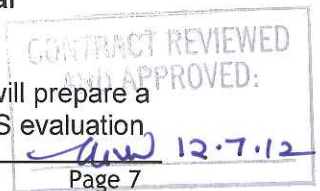
- Assist DSBPC staff to conduct a mandatory pre-bidders' conference
- Assist DSBPC in answering questions posed by participants at the bidders' conference. Questions answered at the pre-bidders' conference will be for information only; official DSBPC responses will take the form of an Addendum to the RFP
- Assist DSBPC in developing responses to written vendor questions submitted by the RFP deadline. DSBPC will release any appropriate Addenda to the vendors

Deliverable: SIS/LIIS Bidders Conference, Bid addendum to answer vendor questions

PHASE IIIB - CONDUCT SIS/LIIS RFP EVALUATION

1. Evaluate Student Information System(SIS)/Local Instructional Improvement System(LIIS) Vendor Proposals

Prior to the start of the SIS/LIIS RFP evaluation process, CELT will prepare a set of RFP evaluation tools and protocols for the DSBPC SIS/LIIS evaluation.





District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

team to use in its evaluation of the written vendor responses. CELT will conduct a workshop with the DSBPC evaluation team to familiarize the team with SIS/LIIS evaluation methodologies, processes, and tools used to select the SIS/LIIS vendor finalists.

As the DSBPC evaluation team completes their scoring of vendors, CELT will compile the individual scores and prepare a summary of all of the components of the written RFPs. The components that make up the final scores are the SIS and LIIS software functional requirements, the written vendor responses to the RFP, and the Five-Year Total Cost of Ownership.

Following the evaluation of the vendor bid responses, the DSBPC SIS/LIIS Selection Committee will determine the vendor finalists using the RFP Evaluation protocol. CELT will complete the following tasks:

- Develop DSBPC SIS/LIIS RFP evaluation protocols and procedures
- Conduct a DSBPC Evaluation Committee meeting to familiarize committee members with the evaluation process.
- Service as a resource for DSBPC evaluation committee members for clarifying evaluation questions, or processes
- Compile and tally the SIS/LIIS vendor product scores and present results to the DSBPC evaluation committee
- Compile and analyze SIS/LIIS vendor five-year costs and summarize results for DSBPC evaluation committee
- Summarize and present weighted tallies of vendor responses to the Selection Committee for the determination of vendor finalists
- Recommend vendor finalists to SIS/LIIS Selection Committee

Deliverables: Coordinate the SIS/LIIS RFP evaluation process, Formal SIS/LIIS vendor evaluation report, Selection of SIS/LIIS vendor finalists

PHASE IIIC- CONDUCT SIS/LIIS FINALISTS DEMONSTRATION SCRIPTS

1. Preparation of the SIS/LIIS Vendor Demonstration Scripts

The SIS/LIIS finalists will be invited to demonstrate their SIS/LIIS product before the DSBPC SIS/LIIS Selection Committee and other school staff members of the school community. CELT will collaboratively work with the DSBPC SIS/LIIS Selection Committee to design a comprehensive set of “demonstration scripts” that each SIS/LIIS vendor finalist must perform. CELT will develop formal demonstration protocols and scripts, to ensure that the SIS/LIIS Selection Committee has the opportunity to evaluate all vendor finalists in an objective, full, and consistent manner.



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

2. Coordinate the SIS/LIIS Vendor Formal Demonstration Scripts

CELT will coordinate formal SIS/LIIS vendor demonstrations for DSBPC. CELT anticipates allotting two days of product demonstrations for each vendor finalist. Due to the comprehensive nature of the SIS and LIIS, sufficient time should be planned by the DSBPC to participate in the evaluation of major subsystems of the proposed SIS/LIIS. Each vendor finalist will follow the demonstration scripts, while their presentation and demonstration is scored by DSBPC personnel. CELT will tally and summarize all vendor scoring sheets from DSBPC personnel participating in the formal vendor demonstration process and present the findings to the SIS/LIIS Selection Committee.

CELT will then analyze the vendor cost summaries and present the DSBPC SIS/LIIS Selection Committee with the overall evaluation based on previously agreed upon selection criteria by DSBPC and CELT. Tasks include:

- Develop formal demonstration protocols and demonstration scripts to be followed by each SIS/LIIS vendor finalist
- Coordinate the formal SIS/LIIS vendor demonstrations
- Collaboratively oversee the DSBPC personnel formal evaluations of the SIS/LIIS vendor finalist demonstrations
- Record and summarize the individual SIS/LIIS evaluation team member scores for review by the evaluation team
- Present findings from the formal SIS/LIIS vendor demonstrations to the Selection Committee
- Analyze vendor cost data and present a summary of the written RFP evaluations, vendor demonstrations, and costs to the DSBPC SIS/LIIS Selection Committee

3. Present SIS/LIIS Vendor Finalist Recommendation to the DSBPC

CELT will assist the SIS/LIIS Selection Committee in making the overall SIS/LIIS Finalist selection based on previously agreed upon selection criteria by DSBPC and CELT. CELT will develop the final SIS/LIIS recommendation report and attend formal presentations of the bid recommendations to DSBPC. Tasks include:

- Prepare final SIS/LIIS recommendation report
- Present final SIS/LIIS recommendation report formally to DSBPC





District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

PHASE IIID - CONTRACT NEGOTIATION ASSISTANCE

1. Assist DSBPC with the SIS Vendor Negotiations

CELT will assist DSBPC in the development of its strategic stance on contractual issues during the contract negotiation process. CELT will advise DSBPC on the best approach to conclude a successful software contract.

Tasks include:

- Prepare DSBPC software negotiation positions
- Advise DSBPC on the best approach to maximize their long-term investment
- Attend Initial DSBPC – Vendor negotiation Meeting and advise the district on Contract Issues

PHASE IV - IMPLEMENTATION ASSISTANCE

2. Assist the District School Board of Pasco County with SIS/LIIS implementation

- Assist the district with SIS/LIIS vendor planning and configuration meetings and advise the district of potential project risks
- Facilitate regular project oversight review meetings
- Review monthly project performance reports on the progress of work
- Monitor the quality and effectiveness of the implementation.
- Proactively perform risk mitigation activities
- Mediate disputes or issues
- Ensure compliance with all contract terms and conditions

CONTRACT REVIEWED
AND APPROVED:

Thu 12.7.12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

All benchmark dates are placeholders and will be finalized with more detail after discussions between CELT and DSBPC

Phase 0: Project Planning and On-Going Management

Task No.	Task Description	Key Milestones/Deliverables	Preliminary Timeframe
<i>Phase 0 - Project Management</i>			
1	Development of follow-on Project Plan and related tools and templates	<ul style="list-style-type: none"> • Draft Project Work Plan • Project tools and templates • Project Organizational Chart • Draft Project Abstract 	November 1, 2012
2	Finalize project management details and refine work plan	<ul style="list-style-type: none"> • Initial DSBPC Project Meetings • Finalize Project Plan • Final list of project participants • CELT and DSBPC procurement team assignments 	November 15, 2012
3	Develop bi-weekly progress report and communication plan	<ul style="list-style-type: none"> • Bi-weekly progress report • Finalize Project Abstract and PowerPoint Briefing 	Nov. 2012 – Dec. 2013
4	Ongoing maintenance of project plan	<ul style="list-style-type: none"> • Plan updates • Progress tracking and progress statements 	Nov. 2012 – Dec. 2013

CONTRACT REVIEWED AND APPROVED:
 MWN 12.7.12



District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

Phase I: SIS/LIIS Needs Assessment

Task No.	Task Description	Key Milestones/Deliverables	Preliminary Timeframe
SIS/LIIS Needs Assessment			
5	Conduct Project Orientation and Launch	<ul style="list-style-type: none"> Project kickoff meeting with District School Board of Pasco County steering committee and project team 	Dec 4, 2012
6	Conduct key stakeholder interviews and focus groups to identify needs of all school and school district constituents	<ul style="list-style-type: none"> Incorporate SIS/LIIS needs of all school district and school staff into SIS/LIIS functional requirements and performance specifications DSBPC staff evaluation of SIS/LIIS functional requirements and performance specifications Needs Analysis: complete interviews and focus groups to develop functional requirements and performance specifications for the RFP to procure a new district SIS/LIIS 	Dec 4, 2012 to Jan 25, 2013
7	Functional Requirements to Project Team	<ul style="list-style-type: none"> Functional requirements delivered to Project Team for review 	February 1, 2013
8	Functional Requirement Review	<ul style="list-style-type: none"> Project Team reviews the functional requirements and returns updates to CELT team 	February 22, 2013

Phase II: SIS/LIIS RFP Development

Task No.	Task Description	Key Milestones/Deliverables	Preliminary Timeframe
Phase II - SIS/LIIS RFP Development			
9	Jointly develop and finalize SIS/LIIS RFP document	<ul style="list-style-type: none"> Final SIS/LIIS RFP document to include the following 	March 8-22,

CONDUCT REVIEW AND APPROVED:
 [Signature]
 12-7-12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

Task No.	Task Description	Key Milestones/Deliverables	Preliminary Timeframe
	with DSBPC staff	sections: ➤ Introduction and Purpose of the RFP ➤ Background on the DSBPC ➤ SIS/LIIS Software and Hardware Standards ➤ Proposal Summary and Proposal Organization for written Vendor Responses: <ul style="list-style-type: none"> ○ Firm Qualifications ○ Project Management Approach and Project Work Plan ○ Proposed Technical Environment ○ Proposed Solution Approach ○ Proposed Approach to Software Enhancements and Customizations ○ Testing Strategy ○ SIS/LIIS Data Conversion Strategy ○ SIS/LIIS Software Support and Maintenance ○ Security Strategy ○ SIS/LIIS Training Approach ➤ Procurement Procedure ➤ Proposed Evaluation Process ➤ RFP Response Format and Contents ➤ Terms and Conditions ➤ Listing of SIS and LIIS Functional Requirements and Specifications ➤ Total Five-Year Total Cost Summary for SIS/LIIS ➤ High-level SIS/LIIS interfacing requirements to DSBPC mission-critical applications	2013

M. W. 12-7-12
 PROJECT REVIEWED AND APPROVED:



District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

Phase III - SIS/LIIS Procurement Process, SIS/LIIS RFP Evaluation, Finalists Demonstration

Task No.	Task Description	Key Milestones/Deliverables	Preliminary Timeframe
Phase III-A Procurement Process - Publically Release SIS/LIIS RFP and Conduct Pre-bidders' Conference			
10	DSBPC Purchasing releases SIS/LIIS RFP to vendors	<ul style="list-style-type: none"> Officially released DSBPC SIS/LIIS RFP document and Appendices 	April 1, 2013 Advertise April 1, 6, and 13
11	Deadline for Written Questions	<ul style="list-style-type: none"> Deadline for Vendor submission of written questions for vendor conference 	April 22, 2013
12	CELT and Pasco County Schools conduct a pre-proposal vendor conference to clarify RFP changes and to answer vendor questions	<ul style="list-style-type: none"> SIS/LIIS Pre-Bidders' Conference Bid Addendum issued to answer Vendor questions 	April 30, 2013
13	Response to vendor questions Posted	<ul style="list-style-type: none"> Vendor questions responded to and posted on Pasco County Schools website 	May 10, 2013
14	Develop SIS/LIIS Vendor Demonstration Scripts	<ul style="list-style-type: none"> SIS/LIIS Vendor Demonstration Scripts SIS/LIIS Vendor Demonstration Evaluation Forms 	May 6-8, 2013
15	RFP Due Date	<ul style="list-style-type: none"> Request for Proposals closed 	May 24, 2013

Phase III-B: Conduct SIS/LIIS RFP Evaluation

Phase III-B Procurement Process - SIS/LIIS RFP Evaluation			
16	Develop SIS-IIS RFP proposal evaluation instructions and templates	<ul style="list-style-type: none"> SIS/LIIS RFP proposal evaluation instructions and templates 	June 1-7, 2013
17	Conduct RFP vendor proposal review meetings	<ul style="list-style-type: none"> Coordination of Evaluation Process 	June 10 – 28,

CONTAINS REVIEWED AND APPROVED.
 M.10.12.7.12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

	Coordinate the evaluation of the SIS/LIIS vendor proposals	<ul style="list-style-type: none"> • Conduct training of DSBPC SIS/LIIS Selection Committee on SIS/LIIS RFP Evaluation Process • Formal Evaluation Report of Vendor Responses • Recommendation Report for SIS/LIIS Vendor Finalists 	2013
18	Select SIS/LIIS Vendor Finalists	<ul style="list-style-type: none"> • Three vendor finalists identified and presented to Pasco County Schools by CELT and project team for approval 	September 17, 2013 Recommendations to the Board September 6th

Phase III-C: Conduct SIS/LIIS Finalists Demonstrations and Select Vendor Finalist

Procurement Process - Conduct Finalists Demonstrations			
19	Coordinate SIS/LIIS Vendor Formal Demonstrations	<ul style="list-style-type: none"> • DSBPC SIS/LIIS Selection Committee Demonstration Orientation • Coordinate SIS/LIIS Scripted Vendor Demonstrations • Summarize Formal Demonstration Vendor Scores; Evaluation Report of the SIS/LIIS Vendor Demonstrations • Recommendations Report of Final SIS/LIIS Vendor to DSBPC Management 	October 1-15, 2013
20	Present SIS/LIIS Vendor Finalist award recommendations to DSBPC	<ul style="list-style-type: none"> • PowerPoint presentation and Recommendations Report of Final SIS/LIIS Vendor to DSBPC Management • Presentation of Final Recommendations Report to DSBPC 	December 10, 2013
21	Vendor Selected	<ul style="list-style-type: none"> • Final SIS/LIIS vendor selected 	December 10, 2013

CONTRACT REVIEWED AND APPROVED:
 [Signature]
 12-7-12



District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

Phase III-D: Vendor Negotiations

<i>Conduct Vendor Negotiations</i>			
22	Coordinate the SIS/LIIS vendor negotiations with the DSBPC	<ul style="list-style-type: none"> DSBPC SIS/LIIS Negotiation Positions Document Assist with the Vendor Negotiation Process culminating with a successful Software and Implementation Contract 	January 2014
23	Selected Vendor presented to District School Board of Pasco County	<ul style="list-style-type: none"> Selected Vendor presented to District School Board of Pasco County for approval 	February 2014
24	Contract Complete with Selected Vendor	<ul style="list-style-type: none"> Contract completed with selected vendor 	May 2014

Phase IV: Implementation Assistance

<i>Conduct Implementation</i>			
25	Implementation	<ul style="list-style-type: none"> Implementation Schedule and Scope of work to be determined. 	2014-2016

M.D. 12.7.12
 CONTRACT REVIEWED
 AND APPROVED:



District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

SIS/LIIS PROPOSAL - SUMMARY OF COSTS

Phase	Cost
<i>SIS/LIIS Procurement Assistance</i>	
Phase 0: Project Planning and On-going Management	\$5,000
Phase I: SIS/LIIS Needs Assessment & Functional Requirements Development **	\$25,000
Phase II: SIS/LIIS RFP Development	\$20,000
Phase III-A: Procurement Process – Conduct Pre-bidders' Conference**	\$2,500
Phase III-B: Procurement Process - SIS/LIIS RFP Evaluation **	\$20,000
Phase III-C: Conduct SIS/LIIS Finalists Demonstrations and Select Vendor Finalist **	\$20,000
Phase III-D: Conduct Vendor Negotiations **	\$2,500
Phase IV: Implementation Management	\$90,000
<i>Total:</i>	\$185,000

** Travel expenses are included in cost line item.

CELT labor rates are billed at \$175 per hour for the project. The cost for on-site travel is included in all project phases.

The project billing will be as follows:

- CELT will invoice the District School Board of Pasco County after the school district receives and accepts deliverables after each project phase
- The school district can request additional services at any time. CELT will propose a scope and cost for agreement before engaging the work

CONTRACT REVIEWED
 AND APPROVED:
MW 12.7.12



District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

Acceptance

This proposal is a full and complete statement of the work needed to deliver this project efficiently. Changes to the scope, schedule, or deliverables will be made only by written direction, and shall be accepted and signed by both parties.

For: CELT

For: District School Board of Pasco County

Signature

Signature

Name

Name

Title

Title

Date

Date

CONTRACT
AND ACCEPTANCE
M.W 12.7.12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

Resumes of Key Project Staff

This section of CELT's response provides background information on the proposed project staff. Based upon the capacity and skills of DSBPC staff, CELT is always willing to adjust its proposed staffing plan.

JOHN BOWLES

SUMMARY OF EXPERIENCE

Mr. Bowles has over 20 years of experience in application requirements planning, project management, and technology planning covering all administrative areas of public education. In his role, Mr. Bowles will be responsible for directing the needs assessment and development of the SIS/LIIS RFP, the management of the SIS/LIIS procurement process, facilitation of the SIS/LIIS vendor pre-bidders' conference, facilitation of the vendor finalists' demonstrations, assisting the school district with the final vendor selection, and subsequent SIS/LIIS vendor negotiations. His most recent work involved the management of the procurement of the student information system and Local Instructional Improvement System for Osceola County Schools, FL and is currently assisting Fort Worth Independent School with their SIS procurement. Previous SIS procurements include Richmond Public Schools, VA; Muscogee County School District, GA; Corona Norco Unified School District, CA; and Manchester School District, NH, and the statewide student information system for the Hawaii Department of Education. The projects included an extensive requirements assessment, SIS/LIIS RFP development, supervision of the SIS/LIIS procurement process, SIS/LIIS RFP evaluation, and formal SIS/LIIS vendor demonstrations.

PROFESSIONAL EXPERIENCE

- More than 15 years procurement experience with student information systems, Instructional Improvement Systems, finance and human resource systems, library and food services management systems
- Managed the administrative procurements of student information systems for Richmond Public Schools, VA; Muscogee County School District, GA; Corona Norco Unified School District, CA; and Manchester Public Schools, NH
- Conducted the requirements analysis and developed the RFP for the Kentucky Department of Education covering administrative applications of student and financial information systems.
- Clients include Richmond Public Schools, VA; Muscogee County School District, GA; Manchester School District, NH; Hawaii Department of Education; Los Angeles County Unified School District; Los Angeles Unified School District; Ohio Department of Education; Pennsylvania Department of Education; Massachusetts Department of Education; Kentucky Department of Education; Colorado Springs School District; Archdiocese of Chicago; and Beaufort County Public Schools, SC

CONTRACT REVIEWED
AND APPROVED:
[Signature] 12-7-12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

EDUCATION AND PROFESSIONAL AFFILIATION

Mr. Bowles has a B.S. degree in business management from Penn State University and an MBA from Northeastern University.

GREG PALMER

SUMMARY OF EXPERIENCE

Mr. Palmer is an Executive Vice President at the Center for Educational Leadership and Technology (CELT), and has more than 17 years experience working as an educational technology and curriculum leader in or with public school districts. Mr. Palmer has more than 15 years experience in technology planning, procurement, and implementation of student information management systems, application and content specific software, and building project management including the renovation of a high school and elementary school. Mr. Palmer will serve as a Co-Project Manager for the Pasco County School District through the procurement and implementation of SIS-IIS systems. His most recent work involved the procurement and implementation of a student information system for the Fort Worth Independent School District in Fort Worth, TX, the procurement of an LIIS/SIS for the Osceola County Schools, FL, and as a project manager for the security and infrastructure build of a Longitudinal Data System for the state of TN.

PROFESSIONAL EXPERIENCE

- More than 17 years experience as an educational technology and/ or curriculum leader serving for 9 years as the Director of Technology and Director of Curriculum, Instruction & Technology for the Canton, MA Public Schools.
- Extensive experience in needs assessment and analysis, requirements gathering, RFP development, procurement, and implementation.
- Implemented a wide range of educational technology projects, including the Cloud based communications and archiving solutions, virtual learning platforms and coursework, discipline reporting, teacher evaluation databases, and content driven instructional technology curriculum.
- Managed the Canton Public Schools, MA, technology model through two building projects totaling more than \$65 mil, and the complete phased implementation of a student information management system featuring robust tools for data collection, state reporting, grading, scheduling, attendance, health, library, transportation, and food services.
- Provided project management and implementations in school or government procurements in Lamar, TX, Fort Worth, TX, Tallahassee, FL, Osceola, FL, Washington, DC, Portland, OR, Wayland, Canton, and W. Bridgewater, MA, and the Massachusetts Department of Education.

CONTRACT REVIEWED
AND APPROVED:

AW Page 20
12.21.12



District School Board of Pasco County

Proposed Consulting Services for the Procurement of an SIS/LMS

EDUCATION

Mr. Palmer holds a Master of Education degree from the University of Massachusetts, Boston, and a Bachelor of Science in Journalism degree from Boston University. He is in the final stages of completing his Project Management Professional (PMP) Certification with an anticipated completion date of June 2012.

DONALD J. GINDER

SUMMARY OF EXPERIENCE

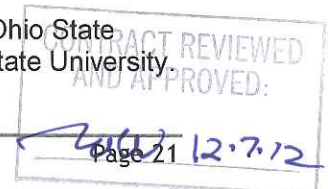
Mr. Ginder has over 20 years experience working with school districts to meet their student administrative and instructional reporting needs and more than 10 years experience in technology planning, software procurement, project management and decision support systems. Mr. Ginder will participate as a resource in various phases of the student information procurement. His most recent work involved the procurement of a Learning Management System for the State of North Carolina and Everett Public Schools, WA; a student information system for Osceola County Schools, FL, Muscogee County School District, GA; a Finance and Human Resources Management System and student information system for Manchester, NH; and a statewide SIS/LIIS system for the Hawaii Department of Education. The projects included extensive requirements assessments, RFP development, and supervision of the procurement process, RFP evaluations, and formal vendor demonstrations.

PROFESSIONAL EXPERIENCE

- More than 20 years experience in the installation, training, and operation of student information systems
- Managed the student information system for a consortium of 25 school districts
- Provided sales and support of student information systems to districts in 10 states and 2 Canadian provinces
- Conducted needs assessment and procurement of SIS/LIIS systems for the North Carolina DPI, Osceola County Schools, FL, Richmond Public Schools, VA; Muscogee County School District, GA; Hawaii DOE; Broward County, FL; and Manchester, NH, and financial systems for Beaufort County, SC, and Manchester, NH
- Conducted interviews and focus groups for a wide range of educational technology projects, including statewide assessment of regional service providers in Ohio, technology plans for Los Angeles Unified School District (twice), Broward County, FL, and Fort Worth Independent School District
- Has provided project management in projects in states of Hawaii, Ohio, and Michigan, Detroit Public Schools, Los Angeles Unified School District, and Fort Worth ISD

EDUCATION

Mr. Ginder holds a Master of Arts in Educational Administration degree from the Ohio State University, and a Bachelor of Science in Education degree from Bowling Green State University.





District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

Terms and Conditions

CONTRACT REVIEWED
AND APPROVED:
uw 12.7.12



District School Board of Pasco County
Proposed Consulting Services for the Procurement of an SIS/LMS

This contract can be amended at the mutual agreement of the parties by addendum.

CONTRACT REVIEWED
AND APPROVED:
[Signature] 12-7-12