WISCONSIN STATE LEGISLATURE ...
PUBLIC HEARING - COMMITTEE RECORDS

2005-06
(session year)

Joint
(Assembly, Senate or Joint)

Committee on Audit...

COMMITTEE NOTICES ...

➢ Committee Reports ... **CR**

➢ Executive Sessions ... **ES**

➢ Public Hearings ... **PH**

INFORMATION COLLECTED BY COMMITTEE FOR AND AGAINST PROPOSAL

➢ Appointments ... **Appt** (w/Record of Comm. Proceedings)

➢ Clearinghouse Rules ... **CRule** (w/Record of Comm. Proceedings)

➢ Hearing Records ... bills and resolutions (w/Record of Comm. Proceedings)
  (**ab** = Assembly Bill)   (**ar** = Assembly Resolution)   (**ajr** = Assembly Joint Resolution)
  (**sb** = Senate Bill)   (**sr** = Senate Resolution)   (**sjr** = Senate Joint Resolution)

➢ Miscellaneous ... **Misc**

Sprocket:	Work order system (asp)
PCS:	Food service system
IMAIL:	District wide email
Phonemaster:	Telephone calling system
MediaMinder:	Centralized Booking System

Currently there may be interface or integration implications for these applications. These applications could also become candidates for replacement in the future. The following operating systems and databases are supported and used by these applications:

Operating Systems: Windows 2000/3 Server and OSX

Databases: Oracle 9i and SQL Server

Typical office productivity software environments include:

Windows 98 and higher

Macintosh 8.x and higher

Microsoft Office (versions appropriate for the O/S)

Microsoft Access

Filemaker Pro

AppleWorks

Netscape Browser 4.7 and higher

Internet Explorer Browser 4.0 and higher

2.2 EXISTING HARDWARE ENVIRONMENT

The Delta Management System is distributed among a total of 25 servers for the student applications serving secondary schools. Elementary school student applications and the financial and HR/payroll systems for all district sites are centralized on the district server. Each secondary school operates their own Powerschool server and the district office houses two servers to support Powerschool for 17 elementary schools.

Across all distributed administrative systems, the total hard disk storage capacity and use statistics are as follows:

Table 6 Administrative System Disk Usage

System	Total HD Space	Total HD Use	Average HD Use
District Admin System	57 GB	30 GB	28 GB
High School System	8.4 GB	2 GB	1.6 GB
Middle School System	8.4 GB	1.5 GB	1.3 GB
TOTAL	73.8 GB	33.5 GB	30.9 GB

Hardware should not be interpreted as all-inclusive. Statistics only portray hardware as it relates to software systems addressed through this RFP.

2.2.1   *DISTRICT OFFICE LOCATIONS – HARDWARE*

The central district server is a Unisys four-processor server running the district financial, district HR/payroll, district student and elementary school student applications. Centrally located in Information Systems are two high speed laser printers, two MICR check printers, a document self-sealer and 2 DLT backup tape drives. The Central Warehouse and Purchasing Departments use two impact line printers. The following is a list of district office hardware with quantities and descriptions:

1   Unisys 4-CPU Server, 4 Intel 400 MHz CPU, 2 GB RAM, 57 GB HD, Raid 0+1

2   OCE' 8465 High Speed Laser Printer

2   HP 9000 MICR Laser Printer

1   Moore PS-4 Turbo Document Folder/Sealer

2   DLT Backup Tape Drives 15 GB Uncompressed and 30 GB Compressed

2   Fujitsu 1200 lpm impact printer

1   Micron Netframe 3100 Server, 400 MHz CPU, 134 MB RAM, 8.4 GB HD for training

1   Micron Netframe 3100 Server, 400 MHz CPU, 134 MB RAM, 84 GB HD for backups

2   OSX Servers

60 HP Laser Printers (at least 1 per department)

The minimum configuration for all Windows and Macintosh Administrative and Teacher workstations portrayed throughout the remainder of this section is:

Windows 98 or higher
Macintosh 8.x or higher
128 MB RAM or more
40 GB HD or more
16X CD-ROM or higher

Table 7   District Office User Workstation Count

User Workstations	Windows 2000+	Windows 98	Mac OSX	Mac 8.x–9.x	Total
Administrative Systems	320	0	50	30	400

Additional software applications outside of the scope of this RFP are supported by the following:

10 Windows 2000/2003 Servers

1   OSX Server

1   HP Optical Jukebox

1   HP Large Format Plotter

2.2.2   HIGH SCHOOL (TYPICAL MODEL OF 1 HIGH SCHOOL)

1   Micron Netframe 3100 Server, 400 MHz CPU, 134 MB RAM, 8.4 GB HD (Delta System)

1   Apple Macintosh Server (Powerschool)

6   HP Laser Printers (minimum)

1   HP Laser Printer for Printing Receipts

1   HP Laser Printer for School Checks

1   Unisys AP1371 Impact Line Printer (serial printer)

Table 8 High School User Workstation Count

User Workstations	Windows 2000+	Windows 98	Mac OSX	Mac 8.x–9.x	Total
Administrative Systems	25	15	5	5	50
Teacher Systems	35	25	12	18	90
TOTAL	60	40	17	23	140

(Refer to District Office hardware for minimum workstations specifications.)

2.2.3   MIDDLE SCHOOL (TYPICAL MODEL OF 1 MIDDLE SCHOOL)

1   Micron Netframe 3100 Server, 400 MHz CPU, 134 MB RAM, 8.4 GB HD (Delta System)

1   Apple Macintosh Server (Powerschool)

3   HP Laser Printers (minimum)

1   HP Laser Printer for Printing Receipts

1   HP Laser Printer for School Checks

1   Unisys AP1371 Impact Line Printer (serial printer)

Table 9 Middle School User Workstation Count

User Workstations	Windows 2000+	Windows 98	Mac OSX	Mac 8.x–9.x	Total
Administrative Systems	10	5	3	7	25
Teacher Systems	15	15	10	20	60
TOTAL	25	20	13	27	85

(Refer to District Office hardware for minimum workstations specifications.)

2.2.4   ELEMENTARY SCHOOL (TYPICAL MODEL OF 1 ELEMENTARY SCHOOL)

1   Xerox Laser Printer (minimum)

Table 10 Elementary School User Workstation Count

User Workstations	Windows 2000+	Windows 98	Mac OSX	Mac 8.x–9.x	Total
Administrative Systems	0	0	3	3	6
Teacher Systems	3	0	9	20	32
TOTAL	3	0	12	23	38

(Refer to District Office hardware for minimum workstations specifications.)

2.2.5   TECHNICAL CENTER/COLLEGE PREP (TYPICAL MODEL OF 1 TECHNICAL/COLLEGE PREP SCHOOL)

1   Apple Macintosh Server (Powerschool)

1   HP Laser Printer (minimum)

Table 11 Technical/College Prep Schools User Workstation Count

User Workstations	Windows 2000+	Windows 98	Mac OSX	Mac 8.x–9.x	Total
Administrative Systems	12	6	3	1	22
Teacher Systems	8	4	3	1	16
TOTAL	20	10	6	2	38

(Refer to District Office hardware for minimum workstations specifications.)

2.2.6   SPECIAL SCHOOLS (TYPICAL MODEL OF 1 SPECIAL SCHOOL)

1   HP Laser Printer (minimum)

Table 12 Special Schools User Workstation Count

User Workstations	Windows 2000+	Windows 98	Mac OSX	Mac 8.x–9.x	Total
Administrative Systems	2	2	3	5	12
Teacher Systems	1	2	10	20	33
TOTAL	3	4	13	25	45

(Refer to District Office hardware for minimum workstations specifications.)

2.3   EXISTING NETWORK INFRASTRUCTURE

The district office serves as a major network hub for all 90 district locations. The network is physically and logically designed to separate administrative network traffic from instructional network traffic. The network information provided refers only to the administrative applications identified in the scope of this RFP. All administrative workstations run Fast Ethernet to the desktop and all physical wiring is cat5. Routers are CISCO and most switches are 3Com. The following is a list of building connectivity:

DISTRICT OFFICE to ADDITIONAL DISTRICT OFFICE SITES:

Single T1 point to point except the Auxiliary Services Building (ASB) which houses major departments identified in section 2.0 and has two (2) T1 point to point lines.

DISTRICT OFFICE to ELEMENTARY SCHOOL SITES:

Single T1 point to point.

DISTRICT OFFICE to MIDDLE SCHOOL SITES:

Eight (8) - 56K channels from a T1 that shares voice and data traffic.

DISTRICT OFFICE to HIGH SCHOOL, ALTERNATIVE SCHOOL, TECH CENTER and SPECIAL SCHOOL SITES:

Single T1 point to point.

2.4   BUSINESS CYCLES AND CAPACITIES

The District fiscal year runs July-June. Budget preparation processes begin in April of the prior year. New Year budget accounts must be available for use by May of each year while the current fiscal year continues to operate. The business system requires an overlap of two fiscal years to be active and operational at the same time. Warehouse orders must be inputted at the end of the school year in one fiscal year and delivered before school starts in the next fiscal year due to year-round elementary schools. Year end processing and rollover to open the next fiscal year are completed in three working days. Peak times for business systems are in June, July, August, September, December and January. Typical business processing includes:

600   accounts payable checks per week

500   purchase orders per week

500   warehouse pick tickets per week

New employee contracts are created and modified during a four week period from mid-June to mid-July. New employee contracts become active during July, August or September dependent on their position. All employees are paid on the 25th of each month. Licensed personnel are offered the option of receiving 10 or 12 pays per fiscal year. For licensed employees whose contract start in August or September and select to receive 12 pays, two extra payroll cycles are run in three working days at the end of June to finish paying current year liabilities. Typical payroll processing includes:

5,000   payroll checks per month

5,000   direct deposit statements per month

12,000+   W2's each year

School calendars include traditional 180 day, four-track 45/15 year-round, quarters, trimesters and combinations of A/B/C/D/E block quarters and trimesters. Year-round elementary schools end and begin again with 3 weeks off in July. The District operates summer school through the Alternative High School and a year-round adult education program during the same time period that student promotions occur. All schools use the scheduling module to varying degrees to facilitate state/federal reporting requirements and to facilitate the use of Powerschool. Student schedule runs and year-round track assignment runs are done concurrently at all schools during the spring. Pre-transfer of student records to enable scheduling for the coming year is processed in two hours during the first week in March. Student Fee Accounting systems are closed in June and rolled over to the next fiscal year in July. Student records are promoted district-wide in a series of year end processes over four working days. State clearinghouse files and reports are due on July 15, October 15 and December 15. Student registration for the secondary schools is done during 2 weeks in August. Secondary Student report cards are printed 4 times a year and Mid-terms an additional 4 times each year. Student schedules are printed 4 times a year. Student Peak times for student systems are in May, July, August, October and December. Typical student processing includes:

34,000 Student Schedules for Secondary Schools (4 times/year)

34,000 Report Cards/Mid-term Reports for Secondary Schools (8 times/year)

40,000 Elementary Report Cards (in process of automation – 3 times/year)

40,000 Elementary Registration Cards (annually)

The following table shows concurrent user statistics:

Table 13 Average and Maximum Concurrent Users

Application	Average Concurrent Users	Max Concurrent Users
Student Systems	100	180
Business Systems	75	125
HR/Payroll Systems	50	90
TOTAL	225	395

2.5 DISTRICT BACKUP SCHEME

The Administrative System backups are performed on a daily basis to ensure data integrity. There is built in redundancy in the backup scheme.

The server located in the district office is known as the District Application server. It is configured with Raid 0+1. Application Data as well as Incremental Backups are stored on this server.

Each secondary school has a separate school application server. They have one OS drive and one application data drive.

In the Auxiliary Services Building is the backup server. It has one OS drive and multiple backup drives. The purpose of the backup server is two fold, to store offsite backup and to use as a redundant server in the event of loss of the District server.

All servers run the SCO UnixWare 7.1.0 SVR5 Operating System. The backups are scheduled using UNIX cron daemon or initiated by an operator. The backups are created in a compressed cpio archive format. All backups are scheduled to run at a specific time to provide data integrity.

The backup scheme is as follows:

- District Application Server incremental backup scheduled Monday through Friday at 3:00 A.M.

    Using the UNIX cron daemon the application data that is modified in 25 days or less is backed up to disk on a daily basis. The vital system files from the OS such as /etc/hosts, /usr/spool/cron/crontabs/root, /etc/hosts.equiv, /.rhosts, system printers and system users are also backed up to disk. The backup normally takes 20 to 30 minutes to finish. The average size of the cpio archive is one GB. The backup is archived for seven days.

- Secondary Application Server backup scheduled Tuesday through Saturday at 4:00 A.M.

    Using the Unix cron daemon all the data from the application drive is backed up on the OS drive and the vital system files from the OS drive such as, etc/hosts, /usr/spool/cron/crontabs/root, /etc/hosts.equiv, /.rhosts, system printers and users are backed up on the application drive. The backup normally takes 1 to 3 minutes to create the cpio format archive. The average size of the backup is approximately 200 MB. Once the backup is finished, the backup is copied to disk on the DISTRICT Application Server. This process takes about 40 to 60 minutes. All the secondary backups are started at the same time.

- DISTRICT Application Server full tape backup initiated Monday through Friday at 5:00 P.M.

    This full backup consists of the District Application Server and all the Secondary Application Server data stored on disk. The backup media is Unisys DLT Tape. The average size of this backup is 28 to 30 GB. These tapes are rotated every four weeks, with the exception of Wednesday's tape which is stored for a year. The tape backups are kept off site in safety deposit box.

- Offsite Disk Backup scheduled Tuesday through Saturday at 6:00 P.M.

    The offsite backup of the District Application Server and the Secondary Application Servers are performed on a daily basis. The incremental backups from the District,

secondary school backups and vital systems file are copied to the backup server. The backup normally takes 30 to 50 minutes. The size of this backup is approximately four GB. These archives are stored for two weeks.

COMPREHENSIVE K12 ADMINISTRATIVE COMPUTER SYSTEM RFP #01RF5P

JORDAN SCHOOL DISTRICT

3.0   LEGAL SPECIFICATIONS

Each Vendor responding to this RFP must include its sample agreements for any or all of the following (if relevant):

1.   Software License and Use (Source and/or Object Code)

2.   Professional Services including:

> Implementation planning and management
>
> Process consulting
>
> Training

3.   Software Maintenance and Support

4.   Hardware purchase (if applicable)

5.   Hardware installation, maintenance and support (if applicable)

JSD desires a single source solution for all items proposed. If multiple providers are involved, they must be identified and cross-referenced either as Joint Vendors or subcontractors and properly identified as such on the appropriate forms. In any event, one Vendor must be designated as the Primary Vendor and take full responsibility for all aspects of the proposed items.

JSD's Legal Specifications contained in Appendix A reflects the terms and conditions necessary to be included in the final agreement(s) for the products and services specified herein. These specifications are not designed to be all-inclusive or be used as the final agreement(s) but are included to be the basis of contract discussions in preparing the final agreement(s). The purpose will be to standardize the evaluation of Vendor's agreements and to augment them where there are provisions required by JSD that are not included in the vendor's existing agreements. JSD requires that each of these specifications be addressed in the Final agreement(s) in essentially the language provided or some acceptable substitute language. **The inclusion of the Vendor's standard forms and/or boilerplate does not constitute a response to these Legal Specifications. Failure to respond to each of the listed paragraphs in Response Form RF3 may constitute disqualification as "non-responsive."**

Finally, as a guide or checklist, these specifications should be used with, not in lieu of, an attorney during the procurement process.

3.1 APPLICATION SOFTWARE LICENSE, PROFESSIONAL SERVICES AND MAINTENANCE

There are specifications that relate to applications and services that might be proposed by any Vendor. In Appendix A are specifications for Vendors providing application software, custom programming and support.

These specifications also include terms and conditions for on-going support for the application software to be awarded. JSD will be looking for several levels of support, from full "turnkey" type of support to an update only service which would include only updates to generally released versions of the software. Since JSD may make modifications to portions of the software, there may need to be a mix of types of support for various subsystems or modules. If JSD should discontinue a support contract, Vendors must allow JSD to "buy back" support by paying for unpurchased months in order to bring the source code up to date during the term of the purchase agreement.

3.2 LEGAL SPECIFICATIONS CHECKLISTS

The RFP Response Form RF3 contains a checklist of all of the legal specifications.
Vendors must:

1) Designate the Primary Vendor in the appropriate box;

2) Accept JSD's clause as stated and will include it as part of the Final signed agreement; or

3) Supply alternative language included and specifically referenced in the response; or

4) Reject the clause in its entirety and reference other paragraphs in which the language is contained.

Unless a rejected clause is contained within another clause in the Vendor's contracts, or any alternative language provided does not materially vary from JSD's clause, rejection or alteration of any clause may cause a Vendor to be declared non-responsive and thereby removed from consideration. Also, any alternative or supplemental language must not contradict or nullify any of the provisions stipulated in the Legal Specifications so defined above.

COMPREHENSIVE K12 ADMINISTRATIVE COMPUTER SYSTEM RFP #01RF5P

JORDAN SCHOOL DISTRICT

4.0   SOFTWARE SPECIFICATIONS

JSD has separated its software requirements into three categories: 1) REQUIRED, 2) DESIRED and 3) OPTIONAL. It is anticipated that JSD will initially award most, if not all, of the REQUIRED systems if Vendors satisfactorily meet the specifications and evaluation criteria. Additional systems will be added from the DESIRED category if they are compatible with the systems awarded in the REQUIRED category and if budget permits. Systems defined as OPTIONAL may be awarded at a later date, but will factor into the evaluation if they are compatible with other awarded systems.

On the RFP Response Price Form RF4, the prices in each section are to be the aggregate prices for all indicated locations. The numbering scheme for this section and the RFP Price Forms is as follows:

4.1.x	REQUIRED SOFTWARE
4.2.x	DESIRED SOFTWARE
4.3.x	OPTIONAL SOFTWARE
4.x.0	IMPLEMENTATION SUPPORT
4.x.1	SOFTWARE – Student/School Applications
4.x.2	SOFTWARE – Business Applications
4.x.3	SOFTWARE – Personnel Applications
4.x.4	SOFTWARE – Payroll Applications
4.x.5	SOFTWARE – Classroom Applications

This section of the RFP defines in general terms the intended use or function of the various subsystems needed by JSD. Vendors may include the capabilities of some of the defined subsystems as part of other subsystems and simply indicate that that particular capability is "Included in _____" on the RFP Software Price Forms. Regardless of the package names used by the vendor, it is the general description of the functions contained herein that specify the intent of the subsystem. For all of the REQUIRED and DESIRED subsystems, each is further defined by the Feature/Function Checklists contained in the RFP Response Form RF4a.

The RFP Price Form RF4 includes three main cost sections Applications/Modules/Components, Support Services and Training. There are several columns provided for vendors to itemize all of the costs related to all aspects of the installation and use of each of the specified services and subsystems described herein. Unless otherwise indicated, the columns and rows should contain prices according to the following terms:

Application/Module/Component

Solution Provided

Place Y for yes or N for no in the "Solution Provided" column for each subsystem included in your proposal, even if it is included as part of another module.

Description

Enter the name and description for the proposed module/application or hardware component. List any Vendor product reference numbers that may help distinguish products.

Cross Reference

If the capabilities for a subsystem listed is provided in a module that is listed in another section, simply cross-reference the section that contains the description and pricing information.

 # Concurrent Users/Quantity

The number of concurrent user licenses that are necessary for the product proposed. Numbers are reflective of aggregate users across the majors systems Student, Business, HR/Payroll and Classroom. Indicate in the description the actual number of licenses proposed. For the hardware section, list the quantity of items being proposed.

License Fees and Product Cost

This column is for 'license fees' for software modules and 'product fees' for any hardware products. Only enter the dollar amount in this column. Price software and hardware based on concurrent user information listed in the RFP.

Program Modifications

These costs are automatically posted from the RF4A Feature Function Worksheet. They represent the project costs required to customize the Vendor's current product to conform to the feature description when a rating of '2' is the Vendor's response. If there is no fee for the enhancement, place a zero in RF4A. With many, if not most, of the subsystems, there will be data conversion or data loading required and/or interfaces to other systems or subsystems already in place. Included in RF4a are the specifications for data conversion and interfaces in relevant modules (Group Code 'DC' and 'IF' respectively), so costs for these services should be included there.

Maintenance

1ˢᵗ Year Maintenance

Indicate the 1st year maintenance cost for the proposed applications, as applicable, in this column. Maintenance should be available during normal working hours (8:00AM to 5:00PM MT) via a toll-free "hotline" arrangement for unlimited questions during the first year following Acceptance and Award. Diagnostics and upgrades should be available through a secure remote access capability. Support charges must include such diagnostic services for error detection and resolution at no additional cost and any and all upgrades or enhancements (including modifications because of Local, State, or Federal mandates) to the software proposed. Response time for either hotline or remote support must be within 2 working hours of the initial call. 1st

Year Support will be the total cost of support for the system for the first 12 months following Acceptance that is inclusive of the warranty period for which no support fees are charged.

Annual Maintenance

Indicate the annual maintenance cost for proposed application software, as applicable, in this column. If there is an escalation percentage each year, do not include that here. Identify any escalation percentages in that 'Esc %' column of the Summary Form. The Annual Maintenance/Support is based on the 12-month cost for support at the monthly rate that goes into effect at the expiration of any initial warranties. While Vendors are not asked to guarantee these rates beyond the second year an escalation percentage cap must be specified in the column provided. This rate will be used to calculate the five-year cost of the proposal even though it is a cap and not necessarily the actual rate in effect at the time. It is in the Vendor's best interest to make this escalator as small as they are contractually willing to commit to.

Support Services

Description

Enter the type of service that will be provided during implementation for each subsystem listed.

Support Resources

There are three separate columns for three different rates and types of resources to be used for the project. Use the description area to describe what will be done by which level(s) and use the three columns to designate the number of person-days proposed to accomplish the task.

# of Trips

Enter the total number of trips needed to complete the total number of days proposed for the implementation service(s).

Trip Costs

In the first section of the spreadsheet there is an area for Standard Rates where rates can be entered once and proliferated throughout the rest of the form. If a single item requires a special rate, it can be overridden simply by deleting the formula in the cell and entering a specific number. For trips to the District, the current standard coach fare with 7 day advance should be used as the basis for the trip cost quote.

Per Diem

In the first section of the spreadsheet there is an area for Standard Rates where rates can be entered once and proliferated throughout the rest of the form. If a single item requires a special rate, it can be overridden simply by deleting the formula in the cell and entering a specific number. Vendors should determine the local hotel, car, and meal rates and set a cap on the per diem charges related to travel which will be used through the term of the project. Please note that the limit for Jordan School District is $225 per day.

Support Total

This column contains formulas and will automatically calculate the total implementation costs. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

Training

Each software application will require different levels of training. Propose the appropriate amount of training for each subsystem or system. Do not propose one lump sum for the entire project. If a certain number of training days are included in the software purchase price, Vendors must still list the training rate information for additional days of training. If no rate is given, the assumption is that all training is free.

It is expected that Vendors will provide appropriate training in the use of their software products by the various positions for which it was designed. Since the software will be essentially "off the shelf" software, the training plan need not be specific to the staffing configuration at the District. However, as part of the training (with sample only necessary for submission with the proposal), it is expected that vendors will provide, in advance of each training class, information as to who the target audience for the class is, what prerequisites may be required or recommended (if any), the course outline, outcome objectives, and assessment techniques for student achievement. For purposes of comparison, Vendors may assume that there will be no more than 12 people for each class of training. If additional sessions are needed to train additional people, the District will contract for the additional training as out-of-scope or add-on project items.

In order to compare prices on an equal basis, the evaluation committee will normalize all Vendors to a specific number of days of training for each application (subsystem). Normalization of training days will be for the purpose of evaluation and price comparison, the award will depend on the Evaluation Committee's recommendation pursuant to site visits and reference checking.

Class Description and Location

Enter the location and type of training class that is needed. Do not lump all training together in one section. Specify training by subsystem.

Class Days

There are three types of training that may be appropriate for each of the modules. A training day is considered to be six hours of class with two hours allowed for setup, teardown, and breaks.

System Admin

> These would be the number of days of training required for the IT staff necessary to administer the application including initial setup, initial configuration, setting up security, file definitions and schema, and other relevant technical information. This might also include the number of training days for Acceptance Test training.

Power User

> These would be days necessary to train the daily and/or frequent users of the system. It should include both initial training as well as at least one follow up visit after several weeks of productive use for more advanced use of the application(s).

End-user

> This would be the number of days needed to train all of the "connected" user accounts indicated for each application in Section 2. Because these are mainly "casual users," shorter class sessions may be appropriate so that several groups could be trained in a single day.

# of Trips

Enter the number of trips necessary to complete the on-site training.

Maximum Number of Students

Enter the maximum number of students that can be accommodated in a training class before additional trainers are needed.

On/Off site

Indicate by "ON" or "OFF" whether the class is to be taught on-site at the District location or off-site at a vendor location. In the event that off-site training is required, the District will calculate the cost of sending the necessary staff for training and include it in the price evaluation.

Rate per Class

This should be one of the three Resource rates (usually Resource Level 3/Trainer) set up under the Standard Rates section.

Total Materials

Enter the total cost for materials per completed class given your specified maximum class sizes.

Trip Costs

In the first section of the spreadsheet there is an area for Standard Rates where rates can be entered once and proliferated throughout the rest of the form. If a single item requires a special rate, it can be overridden simply by deleting the formula in the cell and entering a specific number. For trips to the District, the current standard coach fare with 7 day advance should be used as the basis for the trip cost quote.

Per Diem

In the first section of the spreadsheet there is an area for Standard Rates where rates can be entered once and proliferated throughout the rest of the form. If a single item requires a special rate, it can be overridden simply by deleting the formula in the cell and entering a specific number. Vendors should determine the local hotel, car, and meal rates and set a cap on the per diem charges related to travel which will be used through the term of the project. Please note that the limit for Jordan School District is $225 per day.

Training Total

This column contains formulas and will automatically calculate the total training costs. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

Total

This column contains formulas and will automatically calculate the total 1st year cost for each application, module, component, support service and training. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

4.1   REQUIRED SOFTWARE

The subsystems defined in this section represent those of most urgent need to JSD. The systems specified in this phase are mandatory requirements. Vendors specifying development or modification projects for any of the REQUIRED Subsystems will be considered, but will be rated as only partially compliant because they cannot be evaluated prior to award. Therefore, Subsystems requiring development will be rated lower on the price-per-point scoring. The applications listed in this section represent the core applications of the Comprehensive K12 Administrative Computer System and integration among all of the modules is preferred over interfacing. When third-party applications are proposed, there should be a contractual relationship between the submitting vendor and the third party vendor so that the integration (or interfaces) are coordinated as part of the vendor's on-going support of the product.

Additional functional specifications are included in Response Form RF4a in which sections are numbered according to the subsystem descriptions in this section. Each of the features has been rated by the District as to the level of importance and hence their value in the scoring formula:

3   Feature is mandatory
2   Feature is important but not a requirement
1   Feature is desired

Vendors are asked to respond in the "Compliance Code" column according to the following:

3   Vendor can deliver the feature or capability as described for the price quoted.
2   Vendor will deliver the feature, but will require some level of programming, report writing, or configuration for the price included in the "Project Cost" column. The District has the option of including the feature and related costs in the award and the costs for these modifications are carried through to the RF4 price form via an electronic link.
1   Vendor has a workaround or a different approach to accomplishing what is defined in the feature. Note: Even though this does not yield as many points in the scoring formula, if there is uncertainty as to the capability or meaning defined, this response does not obligate the vendor to provide the feature exactly as defined.
0   Vendor cannot provide the capability.

If there are additional features not listed that you believe distinguish your product(s) and you want them included for evaluation and comparison purposes, you may add features in the Bonus section within each subsystem group. The District will assess the value and importance of the listed capabilities and add points to the vendor's score as they deem appropriate in their sole discretion per the formula in Section 1.

4.1.0   REQUIRED SOFTWARE – IMPLEMENTATION SUPPORT

This section contains specifications and pricing for products and services that apply to all of the applications proposed as REQUIRED (Section 4.1). The Response Form RF4 for this section of specifications is in a slightly different format than the rest of the section to accommodate the anomalous entries.

A.   Preliminary Training – Acceptance Testing

This would be the technical training of two reasonably technical District employees to navigate the system for the purpose of Acceptance Testing.

B.   Monitoring and Support – Acceptance Testing

These services apply to the technical and functional support during the implementation cycle through Final acceptance and productive use of all system modules. This may also include an on-site technician to assist during Acceptance Testing and/or on-call technical support.

C.   Data Conversion – Acceptance Testing

These are the costs related to developing data conversion programs and procedures that will be used initially for a training test bed database and eventually for cutover prior to live operation.

D.   Preliminary Planning – Project Support

These would be the on-site services necessary to gather information related to setting up the system table and parameter files and Finalize the project timeline and implementation schedule.

E.   Project Management – Project Support

These are the costs related to providing the District with periodic (bi-weekly at first, Monthly thereafter until project is complete) project status reports. These reports must include a detailed schedule of tasks to be completed in the next period, who is assigned to them (both District and Vendor resources), what was completed in the prior period, and what delays, problems, or other issues might be outstanding. This must also provide for an issues database reporting system in which District staff can report problems that can be tracked and queried at any time as they are being addressed.

F.   Procedural Consulting – Project Support

These would be the services necessary to assist the District in reengineering their policies and procedures around the capabilities of the new system technologies so that the implementation of the system produces measurable productivity improvements. This would be in addition to the application-specific process reengineering specified elsewhere in this document.

G.   System-wide Functionality – Project Support

The features in RF4a that correspond to this section apply to all systems and subsystems included in this RFP. They include general system security, interface standards and techniques and system interoperability.

STANDARD RATES:

These are fixed rates applied to various levels of staff resources and for travel expenses associated with on-site tasks.

H.   Trip cost – Standard Rates

This should be the standard coach airfare with 7 day advance notice. Enter a description for the basis of the cost. Since airfares fluctuate so much, actual airfare for 7 day advance notice fare will be allowed at the time of travel. These costs will be used as estimates for price comparisons between vendors.

I.   Per Diem – Standard Rates

This cost should include hotel, meals, car rental and other incidentals. This will be the cap. Describe what is included in your cost entered. Jordan School District has a $225 per day limit.

J.   Project Manager Daily Rate (R1) – Standard Rates

This should be the daily rate for the highest level of project resource, usually the Project Manager and/or Resource Level 1. Please describe your resource.

K.   Consultant Daily Rate (R2) – Standard Rates

This should be the daily rate for the primary consulting/support resource used for the project such as a consultant, programmer, and/or Resource Level 2. Please describe your resource.

L.   Trainer Daily Rate (R3) – Standard Rates

This should be the rate used for trainers and/or Resource Level 3. Please describe your resource.

4.1.1   REQUIRED SOFTWARE – STUDENT APPLICATIONS

A.   ADULT EDUCATION

This module provides the functionality to support the adult education functions of the District and integrates with the regular school programs.

B.   ALTERNATIVE HIGH SCHOOL

This module manages relevant information and a procedure required for Alternative High School and integrates with the regular school programs.

C.   CENTRAL COURSE CATALOG

The Central Course Catalog module maintains a common course catalog from which Master Schedules can be built. It allows easy transfer of students within the district and enables district-wide management of curriculum and consistency of student performance in all schools within the district.

D.   COURSE HISTORY/TRANSCRIPT

This module provides for the collection and reporting of student course enrollment, grading, academic credit history, and activity participation.

E.   DAILY ATTENDANCE

This module maintains and reports daily attendance and enrollment information including reasons for absence, attendance categories, student entry date, enrollment date, withdrawal date, intervention actions.

F.   DISCIPLINARY ACTIONS

This module maintains all conduct and behavior information pertaining to student discipline such as detention, suspension, referrals, parent contacts, incident reporting, etc.

G.   ELEMENTARY GRADE REPORTING

This module provides for the collection and reporting of academic progress for elementary school students. Provides for letter marking as well as teacher comments. This module also provides social and academic progress reporting.

H.   ENROLLMENT/DEMOGRAPHICS

This module provides for the consolidation of student information, at the site and district level, for the study of school and district-wide enrollment, attendance boundaries, ethnic distribution, etc.

I.   FEDERAL/STATE PROGRAMS

This module provides for the identification, tracking and reporting of students to Federal and State sources.

J.   GENERAL REQUIREMENTS

This module contains the requirements that apply to all modules in this application system's group.

K.   GRADUATION REQUIREMENTS

This module provides for the maintenance of lists of requirements for graduation and the comparison of student transcript data to those lists for the purpose of planning and determining progress toward, and eligibility for, graduation.

L.   HEALTH/IMMUNIZATION

This module contains features relevant to student health and immunization information.

M.   INDIVIDUAL CLASS SCHEDULE

This module provides the functions necessary to maintain a master class schedule and to maintain individual student class schedules by adding and dropping sections.

N.   MASS SCHEDULING

This module provides for the collection of student course requests and the automatic matching of those requests to a manually built master schedule to produce balanced student schedules.

O.   MASTER SCHEDULE BUILDER

This module provides the capability to build a master schedule given student requests and user-entered guidelines regarding resource availability such as rooms and teachers.

P.   MIGRANT EDUCATION

This module allows the district to track students of migrant and seasonal students and their families.

Q.   OPEN ENROLLMENT

This module provides for the recording and monitoring of requests for students to be assigned to schools of their choice.

R.   PERIOD ATTENDANCE

This module provides for the collection and maintenance of attendance information for each class period in a multi-period daily class schedule including the ability to track hourly attendance.

S.   SECONDARY GRADE REPORTING

This module provides for both progress and end-of-term grade collection and reporting.

T.   SPECIAL EDUCATION INFORMATION

This module provides for the tracking and recording of services rendered to special education students in compliance with Federal, State, and LEA reporting requirements.

U.   STUDENT FEE/ASB ACCOUNTING

Provides for the tracking of assorted student fees such as ASB and other activity, locker, rental, uniform, band instruments, and field trip fees includes capability to manage club accounts and generate and issue checks.

V.   SUMMER SCHOOL

This module manages relevant information and procedures required for Summer School and integrates with the regular school programs.

W.   TESTING HISTORY

This subsystem provides for the recording of all testing results for each student. This information may be used for individual student program planning and progress analysis.

X.   VOCATIONAL EDUCATION

This module manages relevant information and procedures required for Vocational Education and integrates with the regular school programs.

Y.   YEAR-ROUND EDUCATION

This module allows for the assignment of class schedules on a year-round, multi-track schedule and integrates with the regular school programs.

4.1.2   REQUIRED SOFTWARE – BUSINESS APPLICATIONS

A.   ACCOUNTS PAYABLE

This subsystem provides for the maintenance of vendor information, entry of invoice, and processing of payments. Interfaces with the General Ledger, Purchase Order, Requisition Control and Budget Management subsystems.

B.   BUDGET MANAGEMENT

This subsystem allows for the monitoring of department, building and program budgets during the year including detail and summary level information. Provides salary and staffing financial detail at the department level. Interfaces to the General Ledger, Requisitions, POs, Accounts Payable, Payroll, Personnel. and Fixed Assets subsystems.

C.   BUDGET PREPARATION

This subsystem is designed to extract a working budget from the current Chart of Accounts, with factor adjustments by selected accounts, to build site and departmental worksheets for interactive budget manipulation. Supports multiple versions and interfaces to next and current year operational files.

D.   CHECK WRITING

These features are specific to the check writing capabilities of the Accounts Payable subsystem and are integrated with it.

E.   FIXED ASSETS

This subsystem tracks acquisition information and location of all long-term assets owned by the district.

F.   GENERAL LEDGER

This subsystem is a multi-fund account management module for all accounting subsystems such as Accounts Payable, Accounts Receivable, Payroll, etc. Produces Trial Balances and consolidated fund reports. Interfaces with virtually all other Financial subsystems as well as the Payroll/Personnel systems.

G.   GENERAL REQUIREMENTS

This subsystem contains system-wide features for all of the subsystems in this application group.

H.   PURCHASE ORDER

This subsystem produces purchase orders either directly or from a Requisition subsystem and monitors the availability of funds and receipt of goods. Interfaces to the Accounts Payable, Fixed Assets, Budget Management, General Ledger, Receiving, Equipment Inventory, Project/Job Cost Accounting and Stores Inventory subsystems.

I.   REQUISITION CONTROL

This subsystem tracks internal requests for purchases, warehouse orders, maintenance work orders and accounts payable checks. Validates account number and available funds. Interfaces to Purchase Order, Warehouse Inventory, Maintenance Work Order, Accounts Payable and Budget Management subsystems.

J.   WAREHOUSE/STORES INVENTORY

This subsystem tracks central warehouse supplies inventory, receipts and issues. Interfaces with Purchase Orders, Accounts Payable, Purchasing, General Ledger and Requisition Control subsystems.

K.   FIELD TRIP MANAGEMENT

This subsystem allows users to request field trips and provides for an approval process. Field trips can be approved, assigned a bus, assigned a driver, etc.

4.1.3   *REQUIRED SOFTWARE – PERSONNEL APPLICATIONS*

A.   ABSENCE, LEAVE AND SEPARATION

This subsystem provides for recording, maintaining and reporting absence and leave time accrued and used by employees and for employee separation processing, including retirement, end of contract, voluntary separation and dismissal.

B.   EMPLOYEE BENEFITS

This subsystem defines, assigns, and tracks various employee benefit programs such as retirement, workman's compensation, health, life, dental, vision, etc. Interfaces directly to the Payroll System and the Employee Demographics Subsystem.

C.   EMPLOYEE DEMOGRAPHICS

This subsystem creates and maintains basic employee data and specialized information for certain categories of employees. History on employee positions, pay and other activity is also maintained. Interface to all Personnel, Payroll and Business Subsystems.

D.   GENERAL REQUIREMENTS

This subsystem is a set of general requirements that are preferred to be included in all subsystems of a Personnel System.

E.   SALARY PROJECTIONS/BUDGET DEVELOPMENT

This subsystem simulates the budget impact of changes to the various salary and benefit tables. Used as both a budgeting and negotiation tool. Interfaces directly with the Payroll and Personnel Systems.

4.1.4   *REQUIRED SOFTWARE – PAYROLL APPLICATIONS*

A.   EMPLOYEE TIME ACCOUNTING

This subsystem is the data collection mechanism used to input the hours worked by employees for payroll processing. Interfaces with the Employee Demographics and Absence and Leave Subsystems.

B.   FISCAL INTERFACE

This subsystem ensures that payroll transactions from each payroll run are systematically posted to the appropriate General Ledger journals as encumbrances and/or expenditures.

C.   GENERAL REQUIREMENTS

This subsystem contains the requirements to be included in all Subsystems of a Payroll System.

D.   PAYROLL CHECKWRITER

This subsystem prints checks either in batches or individually and interfaces to any of several printers appropriate for printing payroll checks.

E.   PAYROLL PROCESSING

This subsystem provides for the processing of employee paychecks and all associated reports, from timecard entry through gross-to-net calculations, check printing, fringe benefit distribution and tax deposits. Interface to Financials.

4.1.5   *REQUIRED SOFTWARE – CLASSROOM APPLICATIONS*

None

4.2   DESIRED SOFTWARE

The subsystems described in this section can be characterized as stand-alone and/or ancillary to the RFP. Some of these subsystems may be awarded as part of the initial REQUIRED award if they can be cost-justified within current budgets and are compatible with subsystems selected for initial award. This is the section in which ancillary or stand-alone products can be submitted for consideration as part of a combined award with the REQUIRED subsystems. However, issues of connectivity and compatibility with REQUIRED subsystems will be carefully evaluated.

Depending on the prices and capabilities of the REQUIRED Systems described above, JSD will consider purchasing additional software systems as appropriate. JSD's Evaluation Committee will determine the suitability of each proposed system or sub-system to meet JSD's needs based on Vendor's written presentation, live demonstration (if requested) and reference checking. If some of the systems specified in this section are included as part of the systems specified in section 4.1 or if they can be packaged with the above systems at a better price, Vendors are to indicate both the unit price if purchased separately and the incremental package price if combined with the system proposed in Section 4.1.

Features in the DESIRED category are also included in Response Form RF4a and will follow the same scoring formula as defined in Section 4.1 above.

4.2.0   *DESIRED SOFTWARE – IMPLEMENTATION SUPPORT*

The incremental costs for planning and implementing the applications proposed in this DESIRED section must be included. If the District elects to award some, but not all applications proposed by the Vendor in this section, a commensurate adjustment to the Implementation costs will be made during contract discussions.

A.   Preliminary Training – Acceptance Testing

This would be the technical training of two reasonably technical District employees to navigate the system for the purpose of Acceptance Testing.

B.   Monitoring and Support – Acceptance Testing

These services apply to the technical and functional support during the implementation cycle through Final acceptance and productive use of all system modules. This may

also include an on-site technician to assist during Acceptance Testing and/or on-call technical support.

C.   Data Conversion – Acceptance Testing

These are the costs related to developing data conversion programs and procedures that will be used initially for a training test bed database and eventually for cutover prior to live operation.

D.   Preliminary Planning – Project Support

These would be the on-site services necessary to gather information related to setting up the system table and parameter files and Finalize the project timeline and implementation schedule.

E.   Project Management – Project Support

These are the costs related to providing the District with periodic (bi-weekly at first, Monthly thereafter until project is complete) project status reports. These reports must include a detailed schedule of tasks to be completed in the next period, who is assigned to them (both District and Vendor resources), what was completed in the prior period, and what delays, problems, or other issues might be outstanding. This must also provide for an issues database reporting system in which District staff can report problems that can be tracked and queried at any time as they are being addressed.

F.   Procedural Consulting – Project Support

These would be the services necessary to assist the District in reengineering their policies and procedures around the capabilities of the new system technologies so that the implementation of the system produces measurable productivity improvements. This would be in addition to the application-specific process reengineering specified elsewhere in this document.

4.2.1   DESIRED SOFTWARE – STUDENT APPLICATIONS

A.   SCHOOL TEXTBOOK MANAGEMENT

This module provides for the cataloging, distribution, and return of textbooks. It produces fine and penalty notices and interfaces to enrollment, student fee and other appropriate modules.

B.   SCHOOLS INTEROPERABILITY FRAMEWORK (SIF)

This module allows software programs from different companies to share information independent of platform and vendor rules.

C.   STUDENT SELF SERVICE

This is a web-based module for both students and parents to access homework assignments, credit checks, course information and other relevant information about student academic progress.

4.2.2 *DESIRED SOFTWARE –BUSINESS APPLICATIONS*

A.   ACCOUNTS RECEIVABLE

This subsystem allows the District to issue invoices and track receipt of payments for miscellaneous types of accounts and transactions.

B.   BANK RECONCILIATION

This subsystem must be able to accept electronic input from the bank and match it against the database of transactions generated by the proposed system.

C.   PROJECT/JOB COST ACCOUNTING

This subsystem provides for the accounting of any type of project or job which may be specially funded. Spans multiple fiscal years. Interfaces to General Ledger Subsystem.

D.   PURCHASING/BID MANAGEMENT

This subsystem tracks vendor and product purchase history for pricing trends and bid preparation. Interfaces with Purchase Order and Accounts Payable Subsystems.

E.   REVENUE MANAGEMENT

This subsystem provides sources for planning for and managing of limited district revenue to maximize district funds.

F.   TRAVEL VOUCHER

This subsystem keeps track of travel advances and claims for conferences and other out-of-state travel expenses. Interfaces with General Ledger and other financial subsystems.

4.2.3 *DESIRED SOFTWARE – PERSONNEL APPLICATIONS*

A.   EMPLOYEE SELF SERVICE

This module is designed to facilitate employee access to employment and payroll information via web browser on the District's Intranet web site.

B.   PROFESSIONAL DEVELOPMENT

This subsystem monitors various required training, staff development, and education requirements for certain job classifications and/or employees. Produces notices and warning lists of upcoming expirations.

C.   TEACHER CERTIFICATION

This subsystem is a specialized version of 'Professional Development' which focuses exclusively on classroom teachers and their requirements for certification in specific academic disciplines and continuing education.

4.2.4 *DESIRED SOFTWARE – PAYROLL APPLICATIONS*

None

4.2.5   *DESIRED SOFTWARE – CLASSROOM APPLICATIONS*

     A.   TEACHER GRADEBOOK

         This module provides an electronic classroom grade book and tools for the teacher to collect attendance, homework, grades, and other information on a classroom workstation that can be aggregated to the school and/or other district databases.

4.3   OPTIONAL SOFTWARE

Subsystems defined in this section represent needs anticipated for purchase in the future. While it is not likely that any will be purchased during the 12 Months following initial award, the cost for adding them to the REQUIRED and DESIRED configurations will weigh into the selection of initial Finalists and will become part of the District's Information Systems Master Plan.

Since there is no OPTIONAL subsystem features included in Response Form RF4a, the functionality scoring for the subsystems defined in this section will be subjective by Evaluation Committee consensus based on demonstrations, site visits, references and documented and validated functional specifications.

4.3.0   *OPTIONAL SOFTWARE – IMPLEMENTATION SUPPORT*

     The incremental costs for planning and implementing the applications proposed in this OPTIONAL section must be included. If the District elects to award some, but not all applications proposed by the Vendor in this section, a commensurate adjustment to the Implementation costs will be made during contract discussions.

     A.   Preliminary Training – Acceptance Testing

         This would be the technical training of two reasonably technical District employees to navigate the system for the purpose of Acceptance Testing.

     B.   Monitoring and Support – Acceptance Testing

         These services apply to the technical and functional support during the implementation cycle through Final acceptance and productive use of all system modules. This may also include an on-site technician to assist during Acceptance Testing and/or on-call technical support.

     C.   Data Conversion – Acceptance Testing

         These are the costs related to developing data conversion programs and procedures that will be used initially for a training test bed database and eventually for cutover prior to live operation.

     D.   Preliminary Planning – Project Support

         These would be the on-site services necessary to gather information related to setting up the system table and parameter files and Finalize the project timeline and implementation schedule.

     E.   Project Management – Project Support

         These are the costs related to providing the District with periodic (bi-weekly at first, Monthly thereafter until project is complete) project status reports. These reports must include a detailed schedule of tasks to be completed in the next period, who is assigned

to them (both District and Vendor resources), what was completed in the prior period, and what delays, problems, or other issues might be outstanding. This must also provide for an issues database reporting system in which District staff can report problems that can be tracked and queried at any time as they are being addressed.

F.   Procedural Consulting – Project Support

These would be the services necessary to assist the District in reengineering their policies and procedures around the capabilities of the new system technologies so that the implementation of the system produces measurable productivity improvements. This would be in addition to the application-specific process reengineering specified elsewhere in this document.

4.3.1   OPTIONAL SOFTWARE – STUDENT APPLICATIONS

None

4.3.2   OPTIONAL SOFTWARE – BUSINESS APPLICATIONS

A.   BUDGET MODELING

This subsystem provides for the extrapolation of future budgets based on historic trends, applying inflation/adjustment factors and salary and fringe benefits projections within a department or at the institutional level. Interfaces with Personnel and Financial systems.

B.   CASH FLOW AND INVESTMENT

This subsystem provides functions to help manage and project cash requirements and maximize investment income in various interest bearing accounts.

C.   ELECTRONIC DATA INTERCHANGE

Supports the organization to organization electronic exchange of business information in computer readable, structured format.

D.   EQUIPMENT INVENTORY

This subsystem tracks the disposition of all equipment such as typewriters, copy machines, etc. throughout the school district. Automatically interfaces to the Purchasing and Purchase Order subsystems.

E.   INCOME ACCOUNTING

This subsystem tracks all sources of income, anticipated and actual, to the institution's budget. Interfaces with General Ledger and Budget Management subsystems.

F.   RISK MANAGEMENT

This subsystem monitors all insurance policies in the organization including premiums, renewal dates, coverage's, claims, etc.

4.3.3   OPTIONAL SOFTWARE – PERSONNEL APPLICATIONS

A.   APPLICANT TRACKING

This subsystem tracks employees during the hiring process and keeps track of unsuccessful applicants for future positions as they become available. Interfaces with Employee Demographics subsystem.

B.   COBRA

This subsystem tracks former employees who choose to remain on the district health benefits plan and provides for billing for these services.

C.   EVALUATION/GRIEVANCE TRACKING

This subsystem supports the employee appraisal process by tracking probationary and continuous service evaluations due dates and results; tenure; grievance filings and procedures by bargaining unit and contract. Includes interface to Absence, Leave and Separation subsystem.

D.   INSURANCE CLAIM CONTROL

This subsystem tracks all insurance claims by employees including Workers' Compensation, AHERA, other health claims, etc. Produces incident and claims reports by category, employee, etc.

E.   POSITION CONTROL

This subsystem allows the user to look at the Employee Demographics Subsystem from an Organization Chart perspective by position or at individual employees and their assignments to multiple job categories within the organization. Creates an inventory of positions and allows tracking and reporting.

F.   TRAINING ADMINISTRATION

Tracks the staff development for all employees in the organization including District-sponsored training and employee-initiated training. Schedules and monitors training classes and records attendance and completion.

G.   WORKERS' COMPENSATION

This subsystem contains features relating to Workers' Compensation issues that a district may address.

H.   SUBSTITUTE/TEMPORARY

This subsystem maintains a list of substitutes & temporaries for particular job classifications along with their preferences. Once called and assigned, keeps track of costs by absence type, by substitute and by employee.

4.3.4   OPTIONAL SOFTWARE – PAYROLL APPLICATIONS

None

4.3.5   OPTIONAL SOFTWARE – CLASSROOM APPLICATIONS

A.   LESSON PLANNING

This module provides for the development and maintenance of curricular objectives and the grouping of objectives into lessons, units, courses, etc.

B.   COURSE OUTLINES

This module manages the course outline and other relevant information associated with the course listed in the master schedule.

C.   HOMEWORK HOTLINE

This module is a voice messaging system which allows teachers to record daily homework assignments so that parents or students can call in and get homework information.

D.   CURRICULUM MANAGEMENT

This module provides for the integration of curriculum objectives, test items and resources with student assessment for matching instructional delivery of the curriculum.

COMPREHENSIVE K12 ADMINISTRATIVE COMPUTER SYSTEM RFP #01RF5P

JORDAN SCHOOL DISTRICT

5.0   PLATFORM SPECIFICATIONS

Other than the client workstations, new hardware will be required for central server functions. Although new client workstations are not anticipated, some may require upgrades to be compatible with the proposed application software. The forms provided for this section are to provide the specifications (and pricing if the vendor is acting as a reseller) for any and all necessary platform elements to support the proposed application software. The specifications must be detailed and specific so that the District can easily obtain pricing information which will be added to the vendor's proposal as part of the total cost of the system to be compared to other proposals.

On the RFP Response Price Form RF5, the prices in each section are to be the aggregate prices for all indicated locations. The numbering scheme for this section and the RFP Price Forms is as follows:

5.1.x	REQUIRED PLATFORM COMPONENTS
5.2.x	DESIRED PLATFORM COMPONENTS
5.3.x	OPTIONAL PLATFORM COMPONENTS
5.x.0	PLATFORM COMPONENTS – System/3rd Party Software
5.x.1	PLATFORM COMPONENTS – Server Hardware
5.x.2	PLATFORM COMPONENTS – Workstations

Consideration should be given to bandwidth requirements for remote locations needing access to application and database servers located at JSD's main offices. Most of the District's buildings are connected to the central servers via direct circuit T1 lines. Details of the hardware and communications environment are included in Section 2 along with a LAN/WAN Diagram in Appendix F.

The RFP Price Form RF5 is designed mainly for vendors to submit hardware specifications, units and prices. However, even if pricing is not submitted, vendors must specify the necessary hardware to support the proposed applications in sufficient detail and quantity to permit the District to get quotes and determine the hardware costs for the proposed system. In this case, the forms should be accompanied with a detailed hardware specifications document which will become an exhibit to the final agreement.

The hardware price form RF5 includes three main cost sections Component/System Software, Support Services and Training. The columns and rows should be completed according to the following terms:

Component/System Software

Bid or Specification Only

Place a "B" for actual "Bid" if acting as a reseller of the component or system software. Place an "S" for "Specification Only" if you are not a reseller and are only providing technical specifications for the component or system software. Complete a "B" or an "S" for each component or system software included in your proposal, even if it is included as part of another module.

Description

Enter the name, make, model and other descriptions for the proposed hardware component or system software. Include sufficient detail to enable the District to get accurate quotes if necessary. If upgrades are necessary to existing workstations, the description should reflect those requirements with a corresponding unit cost.

Cross Reference

If the capabilities for a component or system software listed are included in a separate item in another section, simply cross-reference the section # that contains the description and pricing information.

 # Concurrent Users/Quantity

List the quantity of items being proposed. If a number already exists in the quantity column, it is portraying estimates of number of existing workstations, printers, etc. for the purpose of comparison pricing.

Product Cost

This column is the unit cost or 'product fees' for any hardware or system software products. Only enter the single unit dollar amount in this column. Price hardware and system software based on concurrent user information listed in the RFP.

Extended Cost

This column contains formulas and will automatically calculate the extended cost based upon unit price and quantity. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

Maintenance

     1ˢᵗ Year Maintenance

     Indicate the 1st year maintenance cost for the proposed system software, as applicable, in this column. Maintenance should be available during normal working hours (8:00AM to 5:00PM MT) via a toll-free "hotline" arrangement for unlimited questions during the first year following Acceptance and Award. Diagnostics and system software upgrades should be available through a secure remote access capability. Support charges must include such diagnostic services for error detection and resolution at no additional cost and any and all upgrades or enhancements to the hardware or system software proposed. Response time for either hotline or remote support must be within 2 working hours of the initial call. 1st Year Support will be the total cost of support for the system for the first 12-months following Acceptance that is inclusive of the warranty period for which no support fees are charged.

Annual Maintenance

Indicate the annual maintenance cost for the proposed hardware or system software, as applicable, in this column. The Annual Maintenance and Support is based on the 12-month cost for support at the monthly rate that goes into effect at the expiration of any initial warranties.

Support Services

Description

Enter the type of service that will be provided during implementation for each component or system software listed.

Support Resources

There are three separate columns for three different rates and types of resources to be used for the project. Project Manger Daily Rate (R1) should be the daily rate for the highest level of project resource, usually the Project Manger and/or Resource Level 1. Consultant Daily Rate (R2) should be the daily rate for the primary consulting/support resource used for the project such as a consultant, programmer and/or Resource Level 2. Trainer Daily Rate (R3) should be the rate used for trainers and/or Resource Level 3. Use the description area to describe what will be done by which level(s) and use the three columns to designate the number of person-days proposed to accomplish the task.

# of Trips

Enter the total number of trips needed to complete the total number of days proposed for the implementation service(s).

Trip Costs

For trips to the District, the current standard coach airfare with 7 day advance notice should be used as the basis for this cost. Since airfares fluctuate so much, actual airfare for 7 day advance notice fare will be allowed at the time of travel. These costs will be used as estimates for price comparisons between vendors.

Per Diem

Vendors should determine the local hotel, car and meal rates and set a cap on the per diem charges related to travel which will be used through the term of the project. Please note that the limit for Jordan School District is $225 per day.

Support Total

This column contains formulas and will automatically calculate the total implementation costs. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

Training

Each component or system software application may require different levels of training. Propose the appropriate amount of training for each item. Do not propose one lump sum for the entire project. If a certain number of training days are included in the hardware or system software purchase price, Vendors must still list the training rate information for additional days of training. If no rate is given, the assumption is that all training is free.

It is expected that Vendors will provide appropriate training in the use of their hardware or system software products by the various positions for which it was designed. As part of the training (with samples only necessary for submission with the proposal), it is expected that vendors will provide, in advance of each training class, information as to who the target audience for the class is, what prerequisites may be required or recommended (if any), the course outline, outcome objectives and assessment techniques for student achievement. For purposes of comparison, Vendors may assume that there will be no more than 12 people for each class of training. If additional sessions are needed to train additional people, the District will contract for the additional training as out-of-scope or add-on project items.

In order to compare prices on an equal basis, the evaluation committee will normalize all Vendors to a specific number of days of training for each component or system software item. Normalization of training days will be for the purpose of evaluation and price comparison, the award will depend on the Evaluation Committee's recommendation pursuant to site visits and reference checking.

Class Description and Location

Enter the location and type of training class that is needed. Do not lump all training together in one section. Specify training by specific line item.

Class Days

A training day is considered to be six hours of class with two hours allowed for setup, teardown and breaks. The type and length of training will be the number of days of training required for the IT staff necessary to function in a system administration role to support the proposed applications.

# of Trips

Enter the number of trips necessary to complete the on-site training.

Maximum Number of Students

Enter the maximum number of students that can be accommodated in a training class before additional trainers are needed.

On/Off site

Indicate by "ON" or "OFF" whether the class is to be taught on-site at the District location or off-site at a vendor location. In the event that off-site training is required, the District will calculate the cost of sending the necessary staff for training and include it in the price evaluation.

Rate per Class

This should be one of the three Resource rates (usually Resource Level 3/Trainer) set up under the Support Resources section.

Total Materials

Enter the total cost for materials per completed class given your specified maximum class sizes.

Trip Costs

For trips to the District, the current standard coach airfare with 7 day advance notice should be used as the basis for this cost. Since airfares fluctuate so much, actual airfare for 7 day advance notice fare will be allowed at the time of travel. These costs will be used as estimates for price comparisons between vendors.

Per Diem

Vendors should determine the local hotel, car and meal rates and set a cap on the per diem charges related to travel which will be used through the term of the project. Please note that the limit for Jordan School District is $225 per day.

Training Total

This column contains formulas and will automatically calculate the total training costs. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

Total

This column contains formulas and will automatically calculate the total 1st year cost for each component, system software, support service and training. Do not manipulate or erase the formulas. Tampering with formulas is grounds for disqualification. If you feel the formula is incorrectly calculating your costs, attach a sheet showing the correct total and explain your calculations.

5.1   REQUIRED PLATFORM COMPONENTS

All of the existing servers are committed to other functions, including the applications servers for the legacy system. Vendors should propose a configuration to appropriately deploy the new applications on new equipment. The minimum workstation configuration is defined below. If any upgrades are necessary, they should be specified and the District will add the estimated cost to the proposal. If the vendor is successful and is granted the award, the District will upgrade the workstations prior to installation of the awarded applications.

5.1.0   REQUIRED PLATFORM COMPONENTS – SYSTEM/3RD PARTY SOFTWARE

This section is provided to designate site licenses, system software licenses, and any other relevant system-wide or District-wide license fees that apply to the REQUIRED sections of this RFP.

A1.   OPERATING SYSTEM AND UTILITIES - Server

This is the software that enables the application software to operate in the proposed hardware environment on the server(s) proposed below in 5.1.1. It includes the utilities to manage the files and peripheral devices (e.g. print spooling) as well as system (and selected file/directory) backup and restore. Pricing should include both server and client access licenses needed.

A2.   OPERATING SYSTEM AND UTILITIES - Client(s)

This is the software that enables the application software to operate in the proposed hardware environment on the workstations proposed below in 5.1.2. It includes the utilities to manage the files and peripheral devices (e.g. print spooling) as well as system

(and selected file/directory) backup and restore. Pricing should include both server and client access licenses needed.

B1. DATABASE ENGINE - Server

This is the data management subsystem which allows for the storage and retrieval of data that is independent of file or system relationships. This must include all the necessary training and setup to prepare the District for supporting it in a production environment.

B2. DATABASE ENGINE – Client

This is the client level license/software necessary to support the applications proposed. This must also include the necessary setup and deployment effort needed to put all of the proposed applications into productive use.

C. BACKUP/RECOVERY

The system must provide for simple manual and automatic backups of all data and programs in the system. As part of the installation pricing, appropriate configuration and setup to ensure regular backups must be included. There must also be the capability to recover selectively as well as the whole system, if required.

D. SECURITY

Many of the subsystems specified have sensitive and confidential information which must be protected from unauthorized access. There must be a system whereby users can be designated different levels of access to different systems. The menu/presentation system should be able to "hide" restricted functions from users unauthorized to access them so they only see what is necessary and available for them to use.

E. AD HOC-QUERY/REPORT WRITER

This subsystem allows for simple and complex user queries against any system databases to produce interactive displays or hard copy reports. This must also include all of the appropriate data dictionaries, views, queries, etc. against the proposed database so that it presents a logical, user-level view of the data for report or query preparation.

F. APPLICATION DEVELOPMENT TOOLS

Vendors must specify a complete set of development tools, templates and documentation necessary to develop ancillary, integrated and compatible applications to those proposed. Tools would allow for changes and customizations while maintaining the integrity of the core source code.

G. OTHER

Vendors must include any and all other system software necessary to support the applications as proposed and as demonstrated to the District in site visits and/or presentations to the District during the RFP process.

5.1.1   *REQUIRED PLATFORM COMPONENTS – SERVER HARDWARE*

It is anticipated that new server hardware will be needed to support the new applications. Although the District may purchase the hardware through other sources to get better pricing,

the vendors must include detailed specifications for what is needed and include costs for configuration and setup as necessary.

A1.   APPLICATION SERVER(S)

This should be the main deployment server(s) supporting the application(s) awarded. It should be rack mountable and with sufficient RAM, disk, backup devices and processor capacity to support the user environment described in Section 2 of the RFP.

A2.   DATABASE SERVER

This should be the server to support the database engine for the proposed applications. It should be rack mountable and with sufficient RAM, disk, backup devices and processor capacity to support the user environment described in Section 2 of the RFP.

A3.   TESTBED/BACKUP SERVER

An additional server that can be used for testing new releases of the software applications and to test backup and disaster recovery procedures is needed. This server will be configured to support all application functions in test mode and/or selected critical applications (such as Payroll and Accounts Payable) including all necessary database, utility and system software.

B.   THIN-CLIENT SERVER(S)

Because of the mix of Windows and Macintosh workstations, there may need to be a thin-client server environment to support these clients such as Citrix. For client-intensive applications, deployment of client software onto physical workstations can become difficult and time-consuming. Therefore, if vendor applications use Citrix or other thin-client solutions to deploy their client/server applications, vendors should propose the server configuration necessary to support the specified number of users.

C.   HIGH VOLUME PRINTER

The District will require high volume, centralized printing for the production of large reports, paychecks and other high volume output from the systems. Vendors are asked to recommend printer(s) appropriate for JSD's size and the applications proposed. Vendors may consider existing printers listed in Section 2.

D.   COMMUNICATIONS

Most of the District's buildings are connected to the central servers via direct circuit T1 lines. Details of the hardware and communications environment are included in Section 2 along with a LAN/WAN Diagram in Appendix F. All local workstations are connected via Category 5 UTP cables to the central network on shared Fast Ethernet (100MB) hubs. Considerations for these bandwidths should be given when configuring the client and server configurations above.

E.   OTHER

If any other special components are required in order to support the hardware specified elsewhere in their proposal, vendors may use this area to define such requirements.

5.1.2   *REQUIRED PLATFORM COMPONENTS – WORKSTATIONS*

Throughout the various departments and sites there are a variety of Windows-based and Macintosh computer workstations which will be used as clients to access the proposed

applications. Details of the District's environment are contained in Section 2 of this RFP. Consideration must be given to the bandwidth constraints of remote clients and the server/client configuration must be designed accordingly.

A1. WINDOWS 98 WORKSTATIONS

The District has a mix of Windows environments as well as hardware configurations. There are approximately 249 Windows 98 workstations. The minimum Windows 98 workstation configuration is:

> Windows 98
> 128 MB RAM or more
> 40 GB HD or more
> 16X CD-ROM or higher

Requirements for upgrades for any of these workstations will need to be factored into the cost of the new environment. Detail of the required upgrade and corresponding cost should be reflected.

A2. WINDOWS 2000 OR HIGER WORKSTATIONS

The District has a mix of Windows environments as well as hardware configurations. There are approximately 762 Windows 2000 or higher workstations. The minimum Windows 2000 or higher workstation configuration is:

> Windows 2000 or higher
> 256 MB RAM or more
> 40 GB HD or more
> 16X CD-ROM or higher

Requirements for upgrades for any of these workstations will need to be factored into the cost of the new environment. Detail of the required upgrade and corresponding cost should be reflected.

B1. MACINTOSH 8.x AND 9.x WORKSTATIONS

The District has a mix of Macintosh workstations in use throughout the District. There are approximately 317 Macintosh 8.x and 9.x workstations. The minimum Macintosh 8.x and 9.x workstation configuration is:

> Macintosh 8.x or 9.x
> 128 MB RAM or more
> 40 GB HD or more
> 16X CD-ROM or higher

Requirements for upgrades for any of these workstations will need to be factored into the cost of the new environment. Detail of the required upgrade and corresponding cost should be reflected.

B2. MACINTOSH OSX WORKSTATIONS

The District has a mix of Macintosh workstations in use throughout the District. There are approximately 331 Macintosh OSX workstations. The minimum Macintosh OSX workstation configuration is:

> Macintosh OSX

256 MB RAM or more
80 GB HD or more
16X CD-ROM or higher

Requirements for upgrades for any of these workstations will need to be factored into the cost of the new environment. Detail of the required upgrade and corresponding cost should be reflected.

C.   Departmental Printers

The minimum equivalent departmental printer is a Hewlett Packard 4050 Laser Printer. Specific quantities for each department and school are included in Section 2 of the RFP.

D   Other

Any other hardware that might be appropriate for the application configurations such as cash drawers, biometric scanners, specialty printers, etc. should be specified here.

5.2   DESIRED PLATFORM COMPONENTS

The software specified in Section 4.2 as DESIRED is not necessarily of lesser priority to the needs of the District than the REQUIRED subsystems, but are systems which could be supplied by third-party vendors as stand-alone applications. In some cases, these applications must be compatible with related REQUIRED subsystems, but in all cases, the hardware must be connectable to the environment on which the REQUIRED subsystems operate.

5.2.0   DESIRED PLATFORM COMPONENTS – SYSTEM/3RD PARTY SOFTWARE

This section is provided to designate site licenses, system software licenses and any other relevant system-wide or District-wide license fees that apply to the DESIRED sections of this RFP.

A1.   OPERATING SYSTEM AND UTILITIES - Server

This is the software that enables the application software to operate in the proposed hardware environment on the server(s) proposed below in 5.2.1. It includes the utilities to manage the files and peripheral devices (e.g. print spooling) as well as system (and selected file/directory) backup and restore. Pricing should include both server and client access licenses needed.

A2.   OPERATING SYSTEM AND UTILITIES - Client(s)

This is the software that enables the application software to operate in the proposed hardware environment on the workstations proposed below in 5.2.2. It includes the utilities to manage the files and peripheral devices (e.g. print spooling) as well as system (and selected file/directory) backup and restore. Pricing should include both server and client access licenses needed.

B1.   DATABASE ENGINE - Server

This is the data management subsystem which allows for the storage and retrieval of data that is independent of file or system relationships. This must include all the

necessary training and setup to prepare the District for supporting it in a production environment.

B2. DATABASE ENGINE – Client

This is the client level license/software necessary to support the applications proposed. This must also include the necessary setup and deployment effort needed to put all of the proposed applications into productive use.

C. BACKUP/RECOVERY

The system must provide for simple manual and automatic backups of all data and programs in the system. As part of the installation pricing, appropriate configuration and setup to ensure regular backups must be included. There must also be the capability to recover selectively as well as the whole system, if required.

D. SECURITY

Many of the subsystems specified have sensitive and confidential information which must be protected from unauthorized access. There must be a system whereby users can be designated different levels of access to different systems. The menu/presentation system should be able to "hide" restricted functions from users unauthorized to access them so they only see what is necessary and available for them to use.

E. AD HOC-QUERY/REPORT WRITER

This subsystem allows for simple and complex user queries against any system databases to produce interactive displays or hard copy reports. This must also include all of the appropriate data dictionaries, views, queries, etc. against the proposed database so that it presents a logical, user-level view of the data for report or query preparation.

F. APPLICATION DEVELOPMENT TOOLS

Vendors must specify a complete set of development tools, templates and documentation necessary to develop ancillary, integrated and compatible applications to those proposed. Tools would allow for changes and customizations while maintaining the integrity of the core source code.

G. OTHER

Vendors must include any and all other system software necessary to support the applications as proposed and as demonstrated to the District in site visits and/or presentations to the District during the RFP process.

5.2.1 *DESIRED PLATFORM COMPONENTS – SERVER HARDWARE*

This section is provided to designate server hardware that applies to the DESIRED sections of this RFP. In all cases, the hardware must be connectable to the environment on which the REQUIRED subsystems operate.

A1. APPLICATION SERVER(S)

This should be the main deployment server(s) supporting the application(s) awarded. It should be rack mountable and with sufficient RAM, disk, backup devices and processor capacity to support the user environment described in Section 2 of the RFP.