THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

General Obligation Bond – Information Exchange, Reporting and Accountability Tool RFP

Request for Proposal No.: 008-PP10

Miami-Dade County Public Schools

Miami-Dade County Public Schools

School Board Administration Building
1450 Northeast Second Avenue
Miami, Florida 33132

Proposals will be accepted until **4:00 PM, (Local Time) September 12, 2013** in the Division of Procurement Management, School Board Administration Building, 1450 N.E. Second Avenue, Room 352, Miami, Florida, 33132, at which time they will be publicly opened and may not be withdrawn for one hundred twenty (120) days from that date.

Table of Contents

NAME AND ADDRESS OF REQUESTER 3
ANTI-COLLUSION STATEMENT 3
I. GENERAL INFORMATION 5
A. PROJECT PURPOSE & SCOPE 5
B. PROJECT DETAILS 5
C. SCHOOL BOARD BACKGROUND 5
II. GENERAL CONTRACTUAL INFORMATION 6
A. INSTRUCTIONS FOR SUBMISSIONS OF PROPOSALS 6
B. CHANGE OR WITHDRAWAL OF PROPOSALS 7
C. PROTEST TO CONTRACT SOLICITATION OR AWARD 8
D. AWARDS 8
E. DEFAULT 9
F. PUBLIC ENTITY CRIMES 9
G. COMPLIANCE WITH STATE/FEDERAL REGULATIONS 9
H. CONE OF SILENCE 10
1. CONTACT WITH M-DPS BOARD EMPLOYEES 10
I. BACKGROUND SCREENING REQUIREMENTS 10
J. COMPLIANCE WITH SCHOOL CODE 10
K. CONFLICT OF INTEREST 11
L. PUBLIC RECORDS LAW 11
M. MISSING DOCUMENTS 11
N. ASSIGNMENT 11
O. CANCELLATION OF PROPOSALS 11
P. TERMINATION FOR CONVENIENCE 12
Q. DEBARMENT 12
R. PURCHASES BY OTHER AGENCIES 12
S. NO GRATUITY POLICY 12
T. COMPLIANCE WITH LAWS 12
U. LOBBYISTS 12
III. GENERAL SCOPE OF WORK 13

A. PROJECT PHASES AND DELIVERABLES 13
1. INITIATION 14
2. ANALYSIS 14
3. DESIGN 15
4. TRANSITION AND TRAINING 15
5. FINAL ACCEPTANCE 15
6. PROJECT STAFFING AND QUALIFICATIONS 16
B. SCOPE OVERVIEW 16
IV. DETAILED EVALUATION CRITERIA 18
V. PRICING SECTION 32
VI. M-DCPS -EVALUATION OF PROPOSALS 33
A. SELECTION COMMITTEE 33
B. EVALUATION PROCESS 33
C. EVALUATION PROCEDURE TO PROVIDE PREFERENCE TO LOCAL BUSINESS 34
D. IMPLEMENTATION SCHEDULE 35
E. ORAL PRESENTATIONS 36
F. PROOF OF CONCEPT 36
VII. TERMS OF CONTRACT 36
A. SELECTED TERMS AND CONDITIONS 36
B. INSURANCE REQUIREMENTS 37
C. INDEMNIFICATION 37
D. EQUAL EMPLOYMENT OPPORTUNITY 38
E. SMALL BUSINESS ENTERPRISE AND MINORITY/WOMEN BUSINESS ENTERPRISE (M/WBE) PARTICIPATION 38
F. LOCAL-VENDOR PREFERENCE POLICY 39
VIII. ADDITIONAL INFORMATION 39
A. RFP QUESTION AND ANSWER PROCESS 39
IX. TERMINOLOGY/ DEFINITIONS 40
X. DISCLOSURE OF EMPLOYMENT OF FORMER SCHOOL BOARD EMPLOYEES 41
XI. ATTACHMENT A 43
XII. ATTACHMENT B 44

NAME AND ADDRESS OF REQUESTER

Miami-Dade County Public Schools
School Operations
Miami, Florida33132

ANTI-COLLUSION STATEMENT

THE UNDERSIGNED PROPOSER HAS NOT DIVULGED TO, DISCUSSED, OR COMPARED THEIR PROPOSAL WITH OTHER PROPOSERS AND HAS NOT COLLUDED WITH ANY OTHER PROPOSER OR PARTIES TO THE PROPOSAL WHATSOEVER. PROPOSER ACKNOWLEDGES THAT ALL INFORMATION CONTAINED HEREIN IS PART OF THE PUBLIC DOMAIN AS DEFINED BY THE STATE OF FLORIDA SUNSHINE LAW.

Certification And Identification For Proposers Submitting Proposals.
I certify that this proposal is made without prior understanding, agreement or connection with any corporation, firm or person submitting a proposal for the same service, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of these proposal specifications and I certify that I am authorized to sign this proposal. I certify agreement with the School Board of Miami-Dade County, Florida Business Code of Ethics and agree to comply with this Code and all applicable School Board contracting and procurement policies and procedures (School Board Policy 6460). I certify that I, nor my company or its principals, or any wholly-owned subsidiary are currently debarred or in default of any bid, purchase order or contract with the School Board or any other private or governmental entity and that the company satisfies all necessary requirements as an entity to do business with The School Board of Miami-Dade County, Florida.

Type of Business Organization and Authority of Signatory:

Indicate type of business organization Proposer does business. For example, Partnership, Limited Partnership, Limited Liability Company, Corporation, etc. If a proposal is submitted by a corporation, provide documentation that the corporation is active and authorized to do business in the State of Florida, and that its corporate status shall remain active and unchanged at the time of award of proposal. As to other types of business organizations, please provide any and all documentation relating thereto, including without limitation, verification that the party signing this proposal is fully authorized and empowered to do so, on behalf of Proposer. In addition, set forth name(s) and title of any and all parties who are authorized to contract on behalf of Proposer

Type of Business Organization and Authority of Signatory (<u>For inclusion in Submittal Package</u>):

LEGAL NAME OF AGENCY OR
PROPOSER SUBMITTING PROPOSAL: _____

MAILING ADDRESS: _____

CITY STATE, ZIP CODE: _____

TELEPHONE NUMBER:_____

TYPE OF BUSINESS ORGANIZATION: _____

E-MAIL ADDRESS: _____

BY: SIGNATURE (ORIGINAL)_____

BY: NAME -TYPED_____

TITLE: _____

I. GENERAL INFORMATION

A. PROJECT PURPOSE & SCOPE

This Request for Proposal (RFP) requests a complete and operational Information Exchange, Reporting and Accountability Tool (Tool), capable of providing Cost, Resource and Document Tracking. Basic characteristics of the Tool include but are not limited to:

- Web-based for quick and wide access by a variety of stakeholders (School Board, General Obligation Bond [GOB] Advisory Committee, parents, students, teachers, administrators, construction staff and general public)
    - As a means to promote GOB transparency
- Proven capacity and ability to manage flow of technical information and document exchange seamlessly during the design and construction process, between M-DCPS staff and project architects, engineers, special consultants and contractors
- Proven capacity and ability to serve as permanent data warehouse of all GOB project related activities for the duration of the General Obligation (GO) Bond implementation period, through completion of all GOB projects
- Accessible through mobile devices such as smartphones and tablets
    - Proven capacity and ability to roll up multiple projects into a summary Executive Dashboard, as well as customized dashboards by project, by Board member M-DCPS, region and local government
- Proven capacity and ability to provide real time cost, resource and status project information through individual project dashboards which combine integrated views of project status and financial information
- Proven capacity and ability to interface with different platforms and applications such as but not limited to SAP, SQL Databases, and Primavera

B. PROJECT DETAILS

On November 6, 2012, The School Board of Miami-Dade County- Florida (M-DCPS, School Board or the Board) asked county voters to invest in their schools by approving the issuance of a $1.2 billion GOB to renovate facilities, update technology, build school replacements, expand student capacity, and enhance facility safety and security. The community let their voices be heard, and an overwhelming 70% of those voting supported the measure. The GOB will allow the M-DCPS to address every school through targeted and strategic improvements. The rollout and implementation of the improvement requires a high level of transparency and effective communication tool.

This RFP is for a fully operational TOOL that can help manage and monitor project status throughout the various stages, including milestones, expenditures and contracting information and has the capacity and ability to effectively and comprehensively address the various elements outlined in the above section of this RFP.

C. SCHOOL BOARD BACKGROUND

Miami-Dade County Public Schools, America's fourth-largest school system with a diverse enrollment of more than 340,000 students from over 100 countries, offers innovative educational programs at over 330 M-DCPS- owned and operated schools, including elementary, middle, senior high schools and alternative, specialized and vocational centers. Students and their families have an active voice in choosing learning opportunities that foster academic excellence, school-to-career pathways and real-world learning.

With 340 programs, including 90 magnet schools, the Miami-Dade school district has one of the largest choice programs in the United States. The impressive array of course offerings include renowned bilingual schools, international baccalaureate programs, schools in the workplace, and a convenient downtown commuter school designed for working parents.

As of the 2012-2013 fiscal year budget, Miami-Dade County Public Schools had an annual capital and operating budget of $3.7 billion, and 44,132 employees, including 20,322 teachers, of which more than 1,200 are National Board Certified, third highest in the nation.

The Strategic Framework has the Student at its center:

II. GENERAL CONTRACTUAL INFORMATION

A. INSTRUCTIONS FOR SUBMISSIONS OF PROPOSALS

Ten (10) originals of the proposal (81/2 X 11), and Fifteen (15) CD's containing the entire proposal, must be received by 4:00 p.m. (Local Time) on September 12, 2013, at:

The School Board of Miami-Dade County, Florida
Bid Clerk, Procurement Management Services
1450 N.E. Second Avenue, Room 352
Miami, Florida 33132

The responsibility for submitting this proposal to the M-DCPS on or before the stated time and date will be solely and strictly the responsibility of the proposer. The M-DCPS will in no way be responsible for delays caused by the United States Postal Service or any other delivery service or caused by any other occurrence. The proposal must be submitted in a sealed envelope or

box marked “GENERAL OBLIGATION BOND – INFORMATION EXCHANGE, REPORTING, AND ACCOUNTABILITY TOOL RFP”.

It is anticipated that a proposal will be presented to The School Board of Miami-Dade County, Florida, (School Board) for acceptance on or about December 11, 2013. If accepted, notification to the successful proposer will be on or about December 12, 2013. The School Board reserves the right to reject any and all proposals.

At a minimum the Vendor must submit a proposal with the following information:

- Proposal Overview
- General Requirements- All Vendors
- Cost Proposal
- Technical Requirements-
    - General Software Functionality
    - Cloud/ SaaS Solution- Hardware Architecture and Administration
    - In-House (behind the School Board’s Firewall)- Hardware Architecture and Administration
    - Cloud/ SaaS Architecture and Administration
    - In-House (behind the School Board’s Firewall)-Software Architecture and Administration
- Technical Requirements- Software Support and Training
- Technical Requirements- Technical Support
- Detailed Pricing Section

Please reference **Sections III, IV and V** for the complete required itemized list of Scope and Deliverables.

Also include **TYPE OF BUSINESS ORGANIZATION AND AUTHORITY OF SIGNATORY** Form (Page 4 of this RFP), **DISCLOSURE OF EMPLOYMENT OF FORMER SCHOOL BOARD EMPLOYEES** Form **FM-3191 Rev. (07-09)** (Page 42 of this RFP), and **ATTACHMENTS A (FM-7138)** and **B (FM-4859)** as applicable.

B. CHANGE OR WITHDRAWAL OF PROPOSALS

PRIOR TO PROPOSAL OPENING. Should the agency or individual proposer withdraw its proposal, they shall do so in writing. This communication is to be received by the Assistant Superintendent, Procurement Management Services, 1450 N.E. 2nd Avenue, prior to September 12, 2013. The agency or individual proposer’s name and the proposal number should appear on the envelope.

AFTER PROPOSAL OPENING. September 12, 2013, proposals may not be changed; and they may not be withdrawn for one hundred twenty (120) days from the opening date.

C. PROTEST TO CONTRACT SOLICITATION OR AWARD

A. The Board shall provide notice of a decision or intended decision concerning a solicitation, contract award, or exceptional purchase by electronic posting which can be accessed at the M-DCPS' website www.dadeschools.net

B. Any person who is adversely affected by the agency decision or intended decision, shall file with the agency a notice of protest in writing within 72 hours after the posting of the notice of decision or intended decision. With respect to a protest of the terms, conditions, and specifications contained in a solicitation, including any provisions governing the methods of ranking proposals or replies, awarding contracts, reserving rights of further negotiation or modifying or amending any contract, the notice of protest shall be filed in writing within 72 hours after the posting of the solicitation. The formal written protest shall be filed within 10 days after the date of the notice of protest is filed. The formal written protest shall state with particularity the facts and law upon which the protest is based. Saturdays, Sundays, and state holidays shall be excluded in the computation of the 72-hour time periods established herein.

C. The protesting party shall be required to post a bond in accordance with F.A.C. Rule 28-110.005(2), and Board Policy 6320. Failure to file a protest within the time prescribed in Section 120.57(3), Florida Statutes, or failure to post the bond or other security required by law within the time allowed for filing bond shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.

D. Formal written protests will be reviewed by Procurement Management Services who will offer the protesting proposer the opportunity to meet and discuss the merits of the protest. If the protest if not resolved, the proposer may seek an administrative hearing pursuant to 120.57(3)(d) Florida Statutes. Petitions for hearings on protests pursuant to 120.57 Florida Statutes must be filed in accordance with School Policy 0133.

E. The "Notice of and/or formal written Protest" shall be filed with:

The Office of the School Board Clerk
Miami-Dade County Public Schools
1450 Northeast Second Avenue, Room 268B
Miami, Florida 33132
Fax: (305) 995-1448
E-Mail: martinez@dadeschools.net

D. AWARDS

A. RESERVATION FOR REJECTION OR AWARD. The Board reserves the right to reject any and all proposals, to waive irregularities or technicalities, and to request re-bids. The Board reserves the right to utilize other governmental contracts, if in the best interest of the Board.

B. NOTIFICATION OF INTENDED ACTION. Notices will be posted on the M-DCPS' website no later than the Friday preceding a regularly scheduled Board meeting.

C. OFFICIAL AWARD DATE. Awards become official upon the Board's formal approval of the award.

D. CHARTER SCHOOLS: Items awarded under this contract shall be made available to charter schools authorized by The School Board of Miami-Dade County, Florida. M-DCPS is not responsible or liable for purchases that may be made by Charter Schools

E. DEFAULT

In the event of default, which may include, but is not limited to non-performance and/or poor performance, the Proposer shall lose eligibility to transact new business with the Board for a period of 14 months from date of termination of award by the Board. Proposers that are determined ineligible may request a hearing pursuant to §120.569, Fla. Statute, and School Board Policy 6320. The School Board reserves the right to reject any and all bids from a Vendor who is currently debarred or in default of any bid, purchase order or contract with the School Board or any other private or governmental entity, pursuant to School Board Policy 6320.04

F. PUBLIC ENTITY CRIMES

Section 287.133(2)(a) Florida Statute. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

G. COMPLIANCE WITH STATE/FEDERAL REGULATIONS

All contracts involving Federal funds will contain certain provisions required by applicable sections of CFR 34, Part 80.36(I) and Part 85.510, Florida Statute 257.36, or Florida Administrative Code Chapter 1B. The vendor certifies by signing the proposal that the vendor and his/her principals are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in federally funded transactions and may, in certain instances, be required to provide a separate written certification to this effect.

During the term of any contract with the Board, in the event of debarment, suspension, proposed debarment, declared ineligible or voluntarily excluded from participation in federally funded transactions, the vendor shall immediately notify the Assistant Superintendent, Procurement Management Services, in writing. Vendors will also be required to provide access to records, which are directly pertinent to the contract and retain all required records for three years after the Board, makes final payment.

It should be noted that for all contracts involving Federal funds in excess of $10,000, the Board reserves the right to terminate the contract for cause, as well as for convenience, by issuing a certified notice to the vendor.

CERTIFY REGISTRATION AND USE OF EMPLOYMENT STATUS VERIFICATION SYSTEM. The Status Verification System, also referred to as “E-verify”, only applies to construction and professional services contracts using federal funds.

Each offerer and each person signing on behalf of any offeror certifies as to its own entity, under penalty of perjury, that the named Contractor has registered and is participating in the Status

Verification System to verify the work eligibility status of the contractor's new employees that are employed in the State of Florida in accordance with Executive Order 13465

The contractor shall require that the following provision be placed in each subcontract at every tier- "The subcontractor shall certify to the main (prime or general) contractor by affidavit that the subcontractor has verified through the Status Verification System the employment status of each new employee in the respective subcontractor, all in accordance with and to comply with all applicable employee verification laws. Such affidavit must be provided prior to the Notice to Proceed for the subcontractor to perform the work." The Board will not consider a proposal for award, nor will it make any award where there has not been compliance with this Section. Manually or electronically signing the Proposal is deemed the Contractor's certification of compliance with all provisions of this employment status verification certification required by all applicable status verification laws.

H. CONE OF SILENCE

1. CONTACT WITH M-DPS BOARD EMPLOYEES

BOARD POLICY 6325

The School Board of Miami-Dade County, Florida, enacts a Cone of Silence from issuance of a solicitation and shall terminate at the time the item is presented by the Superintendent to the appropriate Board committee immediately prior to the Board meeting at which the Board will award or approve a contract, reject all bids or responses, or take any action that ends the solicitation and review process. All provisions of School Board Policy 6325 apply.

Any violation of this policy shall be investigated by the School Board's Inspector General and shall result in the disqualification of the potential vendor from the competitive solicitation process, rejection of any recommendation for award to the vendor, or the revocation of an award to the vendor as being void, rending void any previous or prior awards. The potential vendor or vendor's representative determined to have violated this policy, shall be subject to debarment. In addition to any other penalty provided by law, violation of this policy by a school district employee shall subject the employee to disciplinary action up to and including dismissal.

I. BACKGROUND SCREENING REQUIREMENTS

In accordance with the requirements of §1012.465, §1012.32, §1012.467 and Florida Statutes, and School Board Policies 8475, 1121.01, 3121.01 and 4121.01 as amended from time to time. Proposer agrees that Proposer and all of its employees, including but not limited to subcontractors who provide or may provide services under this RFP will complete criminal history checks, and all background screening requirements, including level 2 screening requirements as outlined in the above-referenced statutes and School Board Policies prior to providing services to the School Board of Miami-Dade County at Proposer's expense upon obtaining clearance by Board. The Board will issue a photo identification badge, which will be worn by the individual at all times while on Board property when students are present.

J. COMPLIANCE WITH SCHOOL CODE

Proposer agrees to comply with all sections of the Florida K-20 Education Code, Title XLVIII Florida Statutes as it presently exists, and further as it may be amended from time to time. Further Proposer agrees that failure to comply with the Florida K-20 Education Code shall constitute a material breach of this Agreement and may result in the termination of this Agreement by the Board.

K. CONFLICT OF INTEREST

Former Miami-Dade County Public Schools employees, classified as Managerial Exempt Personnel, Pay Grade 22 and above, Miami-Dade County School Administrators Association, Pay Grade 47 and above, and other equivalent positions, are prohibited from personally representing another person or entity or acting as an agent or attorney for compensation in connection with any matter in which The School Board of Miami-Dade County, Florida, is interested, for a period of two (2) years following vacation of office. This provision is pursuant to School Board Policies 1129, 3129, and 4129 and § 112.313(9) Florida Statutes.

The School Board of Miami-Dade County, Florida shall be prohibited from entering into any business relationship or continue an existing business relationship with any person or entity determined to have engaged in violation of the restriction contained in this provision

L. PUBLIC RECORDS LAW

This RFP is subject to Florida's Public Records Laws, Chapter 119, Florida Statutes. Proposer understands the broad nature of these laws and agrees to comply with Florida's Public Records Laws and laws relating to records retention. The Proposer will keep records to show its compliance with program requirements. Proposers and subcontractors must make available upon request of the Board, a Federal grantor agency, the Comptroller General of the United States, or any of their duly authorized representatives, any books, documents, papers, and records of the Proposer which are directly pertinent to this specific RFP for the purpose of making audit, examination, excerpts and transcriptions. The Proposer will retain all records for three (3) years after final payment is made or received and all pending matters are completed pursuant to Title 34, Sections 80.36(b)(1) and 85.510, and for a period of five (5) years pursuant to §257.36, Florida Statutes, or Florida Administrative Code Chapter 1B

M. MISSING DOCUMENTS

All proposals received in response to this RFP, will be sealed for a period of 20 days, pursuant to Florida Statute 119.07, to allow for the request and receipt of any missing documents. Respondents who do not meet all the requirements for the RFP may be contacted to submit the missing information within two business days. Incomplete or noncompliant proposals may be disqualified.

N. ASSIGNMENT

This Contract may not be assigned nor may any assignment of monies due, or to become due to proposer, be assigned without the prior written agreement of Miami-Dade County Public Schools. If proposer attempts to make such an assignment, such attempt shall constitute a condition of default.

O. CANCELLATION OF PROPOSALS

Prior to opening, a solicitation may be canceled in whole or in part, prior to the date and hour specified in the Instructions To Agency/Proposer for receipt of proposals, when the Assistant Superintendent, Procurement Management Services, determines in writing, that such action is in the best interest of the Board for reasons including, but not limited to:

1) The Board no longer requires the supplies, services, or construction;
2) The Board no longer can reasonably expect to fund the procurement;
3) A review of a valid protest filed by a proposer as may be determined by the administrative staff; or

4) Proposed amendments to the solicitation would be of such magnitude that a new solicitation is desirable.

When a solicitation is canceled prior to opening, notice of cancellation shall be posted on the M-DCPS website, and sent to all businesses solicited, via facsimile or mail. Any proposals received for the cancelled solicitation shall be returned to the proposer unopened.

P. TERMINATION FOR CONVENIENCE

The School Board may terminate the Agreement at any time without cause upon a minimum thirty (30) days' notice to Proposer, in which case the following provisions shall apply: (A) The notice may be effective as of a date certain or may apply only after the delivery of certain enumerated deliverables;. (B) The School Board shall pay to Proposer upon receipt of an invoice from Proposer otherwise complying with the Agreement, for any services in respect of a deliverable not yet delivered which have actually been performed by Proposer, pro-rated on a percentage completion basis based on Proposer's reconciliation of labor actually expended compared to labor originally estimated by Proposer in constructing its proposal

Q. DEBARMENT

Pursuant to Board Policy 6320 – Contractor Debarment Procedures – Debarred contractors are excluded from conducting business with the Board as agents, representatives, partners, and associates of other contractors, subcontractors or individual sureties.

R. PURCHASES BY OTHER AGENCIES

With the consent and agreement of the successful proposers(s), purchases may be made under this proposal by Miami-Dade County, Florida, and other governmental agencies or political subdivisions within the State of Florida. Such purchases shall be governed by the same terms and conditions stated herein. This agreement in no way restricts or interferes with the right of any State of Florida Agency or political subdivision to rebid any or all of these items

S. NO GRATUITY POLICY

It is the policy of Procurement Management Services not to accept gifts, gratuities, or favors of any kind or of any value whatsoever from vendors, members of their staffs, or families.

T. COMPLIANCE WITH LAWS

Proposers shall comply with all federal, State of Florida and local laws applicable to it and the performance of its obligations under this proposal

U. LOBBYISTS

Board Policy 8150, delineates the policy regarding lobbyists. Pursuant to this rule, lobbyists shall complete annually, a Lobbyist Registration Form, and pay the annual registration fee.

Pursuant to this rule, every person required to register shall list all individuals who may make a presentation when the person appears as a representative for an individual or firm for an oral presentation before a site administrator, or instructional personnel, or certification, evaluation, selection, technical review or similar oral presentation committee. This listing shall include the Clerk's form, the list of presenters, and the indication of fee receipt, prior to the oral presentation. No person shall appear before any employee or committee on behalf of any individual or firm unless he or she has been listed as part of the firm's presentation team or unless he or she is registered with the Clerk's office and has paid all applicable fees.

The Board policy may be accessed at:

http://www2.dadeschools.net/schoolboard/rules/

III. GENERAL SCOPE OF WORK

A. PROJECT PHASES AND DELIVERABLES

The main Scope of this Project is to provide a Cost, Resource and Document Tracking mechanism, capable of interfacing with M-DCPS ERP (SAP), Project Management (Primavera – P6), and various existing databases as described below.
The following table summarizes the project deliverables identified in this section. These deliverables are to be identified in the Vendors Final Project Work plan, are used as payment points in the execution of the project, and are used by the vendor to prepare their cost proposal for this project.

Item	Deliverable	Description
Initiation	Final Scope Document	Documentation of the scope, objectives and overall approach to the project, to be used for project control and execution.
Initiation	Final Project Work Plan	Microsoft Project plan and supporting narrative identifying the phases and tasks of the project, along with schedule, duration, dependencies and resource assignments.
Initiation	Project Status Reports and Workshop Summaries	Weekly tasks to assure progress and completion of Milestones
Analysis	Dashboard Implementation Plan	A document to summarize the analysis and presentation of holistic solution
Design	Detailed Design Plan	Based on Design Workflows prepared by Vendor and M-DCPS
Design	Implementation Project Plan	The project plan with resource estimates that will guide the implementation of the Dashboards. Detailed description of the different interfaces to M-DCPS existing applications, such as SAP, P6 and other SQL databases. The final design will

		produce a complete and functional Cost, Resource and Document Tracking Application
Transition and Training	Knowledge Transfer Plan	A document describing the approach and timing to formal training, OJT, and work experiences that will prepare School Board staff to operate the system effectively at the end of the project. Emphasis should be given to the application's ease of use, and minimum training required by Users when entering and extracting data.
Transition and Training	Plan Progress Documentation	Complete details on Deliverables- Transition and Training Package
Completion	Final Acceptance	Final acceptance, warranties and maintenance program

1. INITIATION

a) PROJECT APPROACH AND PLAN

The Vendor will be responsible for development and maintenance of the project task plan and schedule, based on the approach, methodology and tools used successfully by the Vendor in previous engagements. All submittals will be as indicated, in an 80% format and a Final Format. The 80% Format will be reviewed by the School Board and comments sent back to the Vendor. All comments submitted back from the School Board to the Vendor will be reviewed by the Vendor and feedback provided back to School Board in no more than three (3) working days. All comments will be incorporated into the Final Submittal unless agreed by the School Board in writing.
The Vendor will be responsible for regular reporting of progress against the plan, recommending corrective actions to be taken in the event of unanticipated changes to the plan or schedule, and regular updates to the plan and schedule to accommodate any changes.
The format of the Weekly Reports and content of Workshops will be submitted by the Vendor for School Board's approval prior to the first Report.

Expected Deliverables and Work Products:

- 80% and Final Scope Document (Document)
- 80% and Final Project Work Plan (Document)
- Project Status Reports (Weekly)
- Workshop Summaries (Weekly)

2. ANALYSIS

Implementation project plan
The Vendor must work with the School Board to develop the detailed project plan for implementation of the Proposed Application and subsequent dashboards using the design documentation developed through this project. Vendor is required to submit to the School Board

a detailed plan developed for the Proposed Application that will serve as a baseline for future dashboards. In addition to addressing the technical aspects of implementation, the plan must also address integration of data imported from other external sources (such as SQL Databases, SAP and P6 at a minimum), end-user training and the plan for stakeholder engagement during the implementation process.

Expected Deliverables and Work Products:

- 80% and Final Dashboard Implementation Plan and Data Utilization (Document)

3. DESIGN

Requirements and Design Documentation

The primary products of this project are updated versions of the design documentation, which reflect School Board requirements and requests. This documentation must be in the same form, format and level of detail as the original documentation.

Expected Deliverables and Work Products (all 80% and Final formats):

- User Interface Designs for Dashboards (Document)
- Performance Management Metric Definitions (Document)
- Canonical Data Model with Extensions (Document)
- Data Dictionary (Document)
- Interchange Schemas (Document)
- Workshop Documentation (Document and Workshop)
- Implementation Project Plan

4. TRANSITION AND TRAINING

(1) Knowledge Transfer

Knowledge transfer is a continuous process designed to enable the School Board to properly support the development and extension of the dashboards in the future. This, in turn, requires an excellent understanding of the design principles and architecture embedded in the design documentation. The Vendor will be responsible for development of a knowledge transfer plan for the project team. Through training, workshops and mentoring relationships, the Vendor will be responsible for educating the project team in the methodology and task plan to be used on the project, the architecture and design of the dashboards and database, and the skills and techniques needed for ongoing maintenance of the system.

(2) Expected Deliverables and Work Products:

- 80% and Final Knowledge Transfer Plan (Document)
- Plan Progress Documentation (Workshops)

The School Board believes that knowledge transfer should be in integral part of the overall project plan that incorporates formal training, one-on-one coaching and directed work experience. The plan should identify the knowledge and skills team members need to acquire, the methods to be used to obtain these skills, and a mechanism for tracking progress. Emphasis must be given to the features enabling Users to enter and extract data with little or no effort or training.

5. FINAL ACCEPTANCE

Final acceptance will require completion of all Tasks and Deliverables to the satisfaction of the School Board. (Expand on Final Deliverables and Hand-over requirements)

6. PROJECT STAFFING AND QUALIFICATIONS

The Vendor is responsible to provide and maintain sufficient numbers of qualified management, technical and functional staff to meet the needs of this project and provide the services outlined in the Vendor's response to this RFP. The Vendor is also responsible for development of a detailed resource plan for both Vendor and School Board staff, which defines the staffing and staff organization, and identifies all team participants and their roles and responsibilities. The Vendor must identify key staff and will be required to commit these staff for the life of the project except for legitimate personal reasons, employment termination, acts of God or mutual agreement between the School Board and the Vendor. Any replacement of key staff should have skills and qualifications equal to or greater than the individual that departed. In any case, the School Board reserves the right to interview and agree or not agree on the replacement.
In addition, the School Board is committing the following resources to the project:

- Project Coordinator, 100%
- IT Architect, 60%
- Two (2) Data Administrators/Analysts, 45% each

(These are "not-to-exceed percentages" – dependent on solution proposed)

B. SCOPE OVERVIEW

1. Selected Vendor will provide all documentation concerning implementing the application including but not limited to:

    A. TOOL application must have depth in filtering and drill-down options. Users must be able to compose personalized dashboards, able to track Cost, Resources and Documents. At a minimum, dashboards must have the flexibility of utilizing different graphical features such as: bar charts, bubble charts, pie charts, and/or gages.
    B. TOOL application must be able to produce user-defined reports, using readily available software such as Excel or similar. These reports should be incorporated into regular schedules to run and provide a seamless access to the School Board email program for distribution via e-email to a pre-defined or ad-hoc mail-list.
    C. TOOL application must be able to provide escalation flowcharts for all processes and provide exception reports on all fields native to TOOL or from data imported from external SQL Databases, Primavera P6 or SAP.
    D. System/Hardware Requirements
        a. Cloud or in-house hosting
    E. OS Requirements
    F. Database Requirements
    G. Security Requirements(LDAP)
    H. Single Sign-On through M-DCPS Portal
    I. Networking Requirements
    J. User/ System Constraints
    K. Full Integration Layer with accounting, internal data bases, M-DCPS Enterprise Resource Planning System, and other applications
    L. Review of security parameters and proposed baseline to assure a firewalled and secure environment
    M. For Cloud Based solution – Tier IV Hosting location

2. Selected Vendor will provide all installation scripts for the application accompanied with all documentation pertaining to the installation procedures.

3. Selected Vendor will provide an application that supports all functionality outlined in the functioning Proof of Concept to assure complete compliance with all requirements.

4. Selected Vendor will provide support of the application to include but not be limited to:

    A. Updates and Patches
    B. System Redundancy to Minimize Disruption in Service
    C. Support Phone Numbers
    D. Support Email
    E. Training
    F. Administrative/ Technical Training on the Application's implementation and maintenance
    G. Disaster Recovery Documentation and Procedures
    H. User Manuals and or Online Knowledge base
    I. License Documentation

5. Selected Vendor will assist technical staff in the architecture of the systems supporting the application.

6. Selected Vendor will provide onsite/ offsite support staff in the implementation of the application where necessary.

7. Selected Vendor will assist in any data migration/ data extraction/ maintenance processes associated to the application.

8. Selected Vendor will ensure that the application's framework including all hardware, software and supporting systems meet the requirements outlined in the RFP.

9. Selected Vendor will participate in all phases of the Quality Assurance process including but not limited to:

    A. System testing
    B. User acceptance testing
    C. All phases of issue resolution for the above in a timely fashion

10. Selected Vendor will work with implementation staff to ensure that the application meets all Best Practices, State, Federal and Local educational and government standards, procedures and policies.

11. Post- installation warranty and maintenance
    a. Vendor must detail proposed agreement related to warranty and maintenance.
        i. If Cloud based – detail all yearly fees related to storage and maintenance of the application. Detail infrastructure of the Hosting location and Disaster Recovery Site
        ii. If Hosted-in-House – detail how the Vendor proposes to maintain the application, apply latest updates, address any Service Packs or security/ performance required updates. Detail all yearly fees associated with regular maintenance- Detail how updates will be passed to the School Board and coordination of such updates

IV. DETAILED EVALUATION CRITERIA

The following are minimum requirements to be submitted by Proposers. Failure to submit the minimum requirements, as listed under this section, may render the proposal non-responsive and ineligible for further consideration. Vendor to label all answers, keeping the answers within the Sections and labeling using the "Item Number" provided for each item.

If the proposed application is both In-House and Cloud/SaaS based, Vendor can submit information for both Proposals and they will be evaluated independently as Stated in Section VI

Vendor will receive a Word Document with the Tables shown below and must confirm Compliance (Yes/ No) and provide Comments (**) on:

- How each item will be implemented
- Provide examples on how the Vendor plans to implement the Item
- Any non-compliance concerns or the need to provide a Third Party component to fulfill full compliance
- Provide documentation as requested by the Item

Item No.	Proposal Overview	Compliance (Yes/No)	Vendor's Comments**
P1	**Transmittal Letter**- including 1. Identify the submitting organization. 2. Identify the name and title of the person authorized by the organization to obligate the organization contractually. 3. Identify the name, title, and telephone number of the person authorized to negotiate the contract on behalf of the organization. 4. Identify the name, titles, and telephone numbers of persons to be contacted for clarification. 5. Explicitly indicate acceptance of the requirements in this RFP. 6. Bear the signature of the person authorized to obligate the organization contractually. 7. Acknowledge receipt of any and all amendments to this RFP.		
P2	**Complete Table of Contents-** as		

	part of the submitted package		
P3	**Executive Summary** – including 1. A summary of the proposal to provide the Proposal Evaluation Team with an overview of the business and project features of the proposal. 2. Description of the vendor's project team and each team member's roles and responsibilities and lines of authority and accountability. 3. Information on the background and qualifications of each partner. 4. Discuss any risks and concerns arising from the School Board's RFP. 5. Explain what is needed from the School Board to begin the project		
P4	**Vendor Overview and References**- including 1. Organizational Headquartes information 2. Regional or local offices 3. Primary contact for RFP 4. Corporate qualifications and experience 5. Other value added service or options 6. Vendor install base and references (Provide two references as a minimum- typical size and volume K-12 school system or equivalent) 7. Response to Term and Conditions – note any exceptions or objections 8. Milestone based payment schedule – provide acceptance of a milestone based payment schedule and discuss any conditions or limitations 9. Background checks and investigations – provide acceptance to this requirement and describe any issues or concerns with this requirement		
P5	**Vendor Required Attachments** – such as: 1. Florida Business License (If		

	applicable) 2. Certificate of insurance 3. Latest audited financial statement 4. Vendor standard licensing agreement 5. High level project plan and schedule 6. Key staff resumes – include "hands-on" team not corporate staffing		

Item No.	General Requirements- All Vendors	Compliance (Yes/No)	Vendor's Comments**
G1	Vendor attests to complete understanding of RFP with no questions or inquiries		
G2	Vendor will be available to present a "Proof of Concept" at the request of the School Board		
G3	Vendor will be available for oral presentations if requested by School Board		
G4	Vendor confirms the proposal describes in detail the Vendor's methodology and approach to the project and to project management		
G5	Vendor confirms the proposal describes methods, tools and techniques the Vendor intends to use in providing project management services		
G6	Provide technical requirements necessary to effectively run the system. If not an ASP proposal, then this must include, but may not be limited to, server hardware requirement and configuration, data storage requirements, server operating system and system software requirements and configuration, and recommended hardware/software requirements and configuration. Include any available		

	scalability testing information to support ability to use with over 400 locations. The School Board requires that the hardware configurations provided will be sufficient to allow the School Board to operate the proposed software and any releases for a minimum of six (6) years from implementation *(Note: For a Cloud Solution, the Vendor will be responsible for Acquiring, Installing, Configuring, Maintaining and Upgrading the application.- For an In-House Solution, M-DCPS will be responsible for Maintenance and Upgrades unless otherwise noted in the Contract)*		
G7	Provide documentation (i.e., a flow chart describing the architecture or detailed written response is requested) showing that the proposed software is a centralized system for all required functions		
G8	Provide the desktop requirements including end-user PC/ Tablet minimum and recommended hardware/software requirements and configuration, such as but not limited to the Web browsers and Operating System. (Note: The M-DCPS has a variety of Web browsers and Operating Systems; please submit the minimum requirements for your package.)		
G9	Describe how the software will utilize bandwidth over the M-DCPS network composed of 10 Mbps lines in each school, delivering acceptable response time and performance without overall network degradation		
G10	Vendor to confirm proposal presents major milestones and deliverables and Vendor's approach to manage the schedule, controlling costs, mitigating risk and limiting "scope creep/ expansion"		
G11	Vendor to confirm Cost sub-section		

	includes the costs of any software licenses for tools proposed by the Vendor		
G12	Vendor to confirm proposal describes the proposed management structure and identify all key personnel including references		
G13	Vendor to confirm proposal describe the Vendor's knowledge transfer philosophy, and the approach that will be used in the project		
G14	Vendor to confirm proposal must describe the approach proposed by the Vendor to ensure the School Board staff will be able to take ownership and continue the project development and maintenance of the dashboards		
G15	If a Cloud solution is proposed: Proposal must indicate location of main Data Center (DC) and the Disaster Recovery (DR) redundant site. Include information on DC and DR Tier/ Level of Redundancy for the electrical, mechanical, telecommunications and building infrastructure. (Note: Main location must be a Tier IV facility – Vendor to submit SLA of Hosting Site)		
G16	Vendor to provide documentation on how well has the proposer performed on similar contracts through evidence of the references submitted and if applicable- explain past performance in similar contracts awarded previously by M-DCPS?		
G17	Vendor to provide documentation on level of personnel experience proposed for implementing the services on this proposal – Explain in detail experience directly related to implementations in K-12 or academic environments of a size/ complexity equivalent to M-DCPS		

Item No.	Cost Proposal (Proposed costs will be submitted under the Pricing Section)	Compliance (Yes/No)	Vendor's Comments**
C1	Vendor to confirm all costs associated with the requirements are listed in cost tables		
C2	Vendor to confirm the Total Not To Exceed (V.1) is broken down and detailed by: 1. Project Management 2. Analysis and Design 3. Knowledge Transfer 4. Implementation Plan 5. License Costs 6. Other		
C3	Vendor to confirm proposal is a fixed price solution, all costs figures are inclusive of travel and expenses (no travel and/or living expenses shall be billable to the School Board)		
C4	Vendor to confirm all costs shall exclude all applicable taxes		
C5	The School Board may request additional services from the selected Vendor and require hourly rates in the event that additional services are required (provide hourly rate by title and area of expertise as it relates to a typical project)		
C6	Vendor to identify labor categories and rates that will be used to cost any additional work that may be required by the School Board. Note that the selected Vendor must guarantee those rates for the life of the project		

Item No.	Technical Requirements- General Software Functionality	Compliance (Yes/No)	Vendor's Comments**

T-SWF1	Proposed application must interact with various SQL databases, ERP and other applications owned and administered by the School Board		
T-SWF2	Describe how the product could integrate with Microsoft SharePoint Server Note: M-DCPS utilizes both SharePoint 2007 and 2010		
T-SWF3	Describe how this product allows for online use (i.e., anytime, anywhere access)		
T-SWF4	Describe how the proposed application allows for use with mobile devices		
T-SWF5	Describe how this application uses assistive technologies to comply with IDEA (Individuals with Disabilities Education Act) federal requirements		
T-SWF6	Describe the software solution's security protocols for client, transactions, and server, including encryption. Provide documentation detailing how this is achieved Note: Application must be capable of implementing Digital Signatures as part of the internal approval process. Digital Signatures will be used by both internal and external users		
T-SWF7	Describe the application's ability to accommodate multiple levels of authorization such as parent, school, and administrator levels. Describe all possible methods for provisioning the various security/authorization levels Note: Vendor to describe in detail how it plans to utilize M-DCPS's Active Directory to incorporate various security levels		
T-SWF8	Describe whether your application offers a Software Development Kit or APIs (Application Program Interface)		

T-SWF9	Describe whether your application has any problems accepting data files via standard FTP with PGP (Pretty Good Protection)		
T-SWF10	Describe how your application would interface either with M-DCPS' SQL operational data store without a SIF (School Interoperability Framework) interface		
T-SWF11	Describe how often you will be able to accept data feeds from M-DCPS		
T-SWF12	Describe the technical requirements necessary to effectively run the application. Include server hardware requirement and configuration, data storage requirements, server operating system, and system software requirements and configuration. Also, include details demonstrating level of alignment to current M-DCPS environment of Microsoft IIS 6/7, SQL Server 2005/2008, .NET framework 2.0/3.0, Windows Active Directory, and Microsoft Windows Server 2003/2008 (or most current)		
T-SWF13	Describe whether the software solution has been utilized in a VMware environment Note: Solution must be fully and proved compatible with VMware-		
T-SWF14	Describe how your application would use Active Directory to authenticate and/or manage users, applying Single Sign On Note: Access to TOOL will be thorugh M-DCPS Portal		

Item No.	**Technical Requirements- Cloud/ SaaS Solution- Hardware Architecture and Administration**	**Compliance (Yes/No)**	**Vendor's Comments****
T-CS1	Vendor to provide available level for DC and DR locations (99.xxx%)		

T-CS2	Fuel Tanks - the DC must have high capacity fuel tanks ensuring 72 hours power backup with contracts for fuel supply on demand.		
T-CS3	The Computer Room shall have a microprocessor based system to detect water leakage within a short period of time.		
T-CS4	Facility must comply with applicable Federal and State regulations and policies and Statement on Standards for Attestation Engagements (SSAE) No. 16 (old SAS 70)		
T-CS5	The Vendor must provide all facility availability issues (downtime or degradation of services) for the three (3) years prior to the date of this RFP (If the Site has less than three years of operation, state conditions of similar installations).		
T-CS6	How is the maintenance time at the DC determined?		
T-CS7	How will the School Board be notified before and after any maintenance event?		
T-CS8	How much outage due to maintenance is envisioned for each scheduled event?		
T-CS9	At what time of year is maintenance scheduled?		
T-CS10	What is the main DC site's maintenance plan?		
T-CS11	Provide a copy of the site's Disaster Recovery plan.		
T-CS12	Vendor to describe their communication plan for scheduled and rountine maintenance.		
T-CS13	Confirm power to the DC is available from two different sources.		
T-	Vendor to describe how redundant Telecommunications facilities are		

CS14	provided and document any downtime experienced in the last 12-months.		

Item No.	Technical Requirements- <u>In-House</u> (behind School Board's Firewall)- Hardware Architecture and Administration	Compliance (Yes/No)	Vendor's Comments**
T-HAA-1	Define the platform/environment necessary to run the software. Define the hardware requirements / considerations to operate the system as proposed Design, capability and functionality of the proposed hardware, including conformance with the School Board's architectural direction		
T-HAA-2	Vendor will specify the proposed Archiving/ Storage process, amount of space projected and proposed hardware manufacturer		
T-HAA-3	Vendor will specify the proposed Backup and Recovery process, amount of space projected and proposed hardware manufacturer (based on alloted GOB amount)		
T-HAA-4	Vendor will specify the proposed Data Warehousing and Analytics processes, and proposed hardware manufacturer		
T-HAA-5	Vendor will specify the proposed Information Governance process, and integration with existing processes		
T-HAA-6	Vendor will specify the proposed Archiving process, amount of space projected and proposed hardware manufacturer- Could Archive be able to be housed at M-DCPS Data Center location? Explain		
T-HAA-7	Vendor will specify the proposed Security process, and integration with existing processes		
T-HAA-8	Vendor will specify any proposed Virtualization process <u>Note</u>: Proposed solution must be fully		

	and proved compatible with VMware-		
T-HAA-9	Vendor to specify requirements for Database Server, Web Server (Does the data stored within your proposed solution reside in a single database?)		
T-HAA-10	Vendor will specify the proposed impact to Internet firewall configuration		
T-HAA-11	Vendor to explain in detail methodology to follow if they plan to integrate proposed solution with SharePoint		
T-HAA-12	Vendor to specify if there is a maximum number of concurrent users logged in simultaneously supported by the proposed solution? a. How does the proposed solution define "concurrent user"		

Item No.	Technical Requirements- Cloud/ SaaS Software Architecture and Administration	Compliance (Yes/No)	Vendor's Comments**
T-CSW-AA1	Vendor must provide information on: 1. How often is the proposed solution software updated and releases made available? 2. How often are hardware upgrades required? 3. If future patches, updates or releases are issued by the Vendor within the life of the contract they will be implmented at no cost to the School Board. a. Explain how the Vendor plan to deliver the aforementioned patches, updates or releases b.Who is responsible for installing patches, updates and releases? (is the operation performed by Vendor's employees or subbed to "Others") c. When did you release the latest		

	version of the proposed solution? d. When are you slated to release the next version or major upgrade of the proposed solution? e. When is the current version of the proposed solution scheduled to be retired? 4. Is there a maximum number of concurrent users logged in simultaneously supported by the proposed solution? a. How does the proposed solution define “concurrent user”		
T-CSW-AA2	Vendor will specify mobile platforms supported by the proposed solution. How are mobile capabilities implemented?		
T-CSW-AA3	Vendor to identify components of the proposed product or services provided by third-party technology partners. This includes OEM software, et al. (Provide the third-party technology partner(s) name(s), address(es), and contact(s). Explain additional costs or fees associated with the components)		
T-CSW-AA4	Vendor to explain in detail how they plan to integrate the proposed Cloud/ SaaS solution with the School Board’s Exchange Active Directory (AD) to conform with the Client’s request of Sigle Sign On through M-DCPS Portal		

Item No.	**Technical Requirements- <u>In-House</u> Software Architecture and Administration**	**Compliance (Yes/No)**	**Vendor's Comments****
T-SW-AA1	Vendor must provide information on: 1. How often is the proposed solution software updated and releases made available? 2. How often are hardware upgrades required? 3. If future patches, updates or releases are issued by the Vendor within the life of the contract they will		

	be implmented at no cost to the School Board. a. Explain how the Vendor plan to deliver the aforementioned patches, updates or releases b. Who is responsible for installing patches, updates and releases- will the Vendor provide support to M-DCPS ITS? c. When did you release the latest version of the proposed solution? d. When are you slated to release the next version or major upgrade of the proposed solution? e. When is the current version of the proposed solution scheduled to be retired? 4. Is there a maximum number of concurrent users logged in simultaneously supported by the proposed solution? a. How does the proposed solution define “concurrent user”		
T-SW-AA2	Vendor will specify mobile platforms supported by the proposed solution. How are mobile capabilities implemented?		
T-SW-AA3	Vendor to identify components of the proposed product or services provided by third-party technology partners. This includes OEM software, et al. (Provide the third-party technology partner(s) name(s), address(es), and contact(s). Explain additional costs or fees associated with the components)		
T-SW-AA4	Vendor to explain in detail how they plan to integrate the proposed In-House solution with the School Boards Exchange Active Directory (AD) to conform with the Client’s request of Sigle Sign On through M-DCPS Portal		

Item No.	Technical Requirements- Software Support and Training	Compliance (Yes/No)	Vendor's Comments**
T-SW-ST1	Vendor to provide a typical Support and Training Plan applicable for this type of application		
T-SW-ST2	Vendor to provide detailed plan for support during the first year of operations		
T-SW-ST3	Proposal must identify key milestones in the knowledge transfer process and identify major deliverables of work products of this process		

Item No.	Technical Requirements- Technical Support	Compliance (Yes/No)	Vendor's Comments**
T- TS-1	Required response time during business hours: Routine – 2 hours		
T- TS-2	Required response time during business hours: Emergency – ½ hour		
T- TS-3	Required response time after business hours: Routine – 4 hours		
T- TS-4	Required response time after business hours: Emergency – 2 hours		
T- TS-5	Required Contact Person in case of routine requests for support (Trouble Ticket): Solution Advisor (or equivalent) and escalation procedures if unresolved within the time listed above		
T- TS-6	Required Contact Person in case of emergency requests for support: Client (Trouble Ticket): Services Manager (or equivalent) and escalation procedures if unresolved within the time listed above		
T- TS-7	Required: Vendor to provide: 1. Escalation procedures, amount of minutes each escalation level will have the Trouble Ticket in an unresolved status		

	2. Detailed description of skills the Vendor support team will offer at each escalation level. (Note 1: School Board will retain the option of by-passing a "Level of Escalation" if trouble is not resolved in the alloted time Note 2: Business hours are M-F 7:00AM – 6:00PM and Saturdays 8:00AM to 12:00PM)		

V. PRICING SECTION

SECTION	RESPONSE SECTION
1	**Total Implementation-Not To Exceed Cost** – broken down by: 1. Project Management 2. Analysis and Design 3. Knowledge Transfer 4. Implementation Plan 5. License Costs 6. Other
2	**Future Vendor Rates** – broken down by year to a maximum of 8 years (by year) Include: licensing, related Cloud/SaaS support, upgrades/updates, miscellaneous yearly costs, personnel support (Reference Item C5)
3	**Staff Loading** – list the titles of proposed positions on the project team to be filled by Vendor staff. Identify by month the number of hours that each position is planned to work on the project and provide a total for the project
4	**Payment Schedule by Deliverable** – It is the School Board's intent to negotiate a milestone- based fixed-fee payment structure based on acceptance of deliverables. Vendors are required to submit a proposed payment schedule that is tied to specific dates/ milestones on which invoices will be generated.
5	**Other** (As Needed)

6	**Attachments and Assumptions** – state any significant assumptions associated with the one-time cost for this proposal

VI. M-DCPS -EVALUATION OF PROPOSALS

A. SELECTION COMMITTEE

The selection committee will consist of the following representatives or their appointed designee:

- Representative, Information Technology Services (ITS);
- Representatives, Office of School Facilities (2);
- Representative, Financial Services;
- Representative, Office of Risk and Benefits Management;
- Representative, 21st Century Schools Advisory Committee;
- Representative, School Operations;
- Representative, Office of Economic Opportunity/W/MBE; and
- Representative, Procurement Management Services (non-voting).

Proposals will be reviewed and evaluated by the selection committee, on the basis of qualifications, and evaluation criteria as set forth in the RFP. Proposals deemed to be in conformance with RFP requirements will be reviewed and scored by the selection committee. Proposers may be requested to provide a presentation at a committee meeting. At the meeting, each proposer will be allotted time to give an overview/presentation of their product and support solutions. The presentation may include a live demonstration of their proposed products. In addition, Proposal(s) defined as best meeting the M-DCPS' requirements, after demonstrations, may be required to provide, at no charge to the M-DCPS, a Proof of Concept (POC) to verify and demonstrate the claimed functionality and infrastructure, and scalability of product as stated in the proposal.

B. EVALUATION PROCESS

Evaluation Process for the proposal is as follows:

TIER I: CONFORMANCE:

Proposals submitted will be reviewed for conformance to Required Items specified in Section IV DETAILED EVALUATION CRITERIA. Non-conforming proposals will be eliminated from further consideration.

TIER II: FURTHER EVALUATION CRITERIA:

Conforming proposals will be scored a maximum of 100 points based on the following guidelines utilizing Items detailed in Section IV and cost proposal sheets.
Note: A maximum of eighty (80) points are awarded to all Vendors. Depending on the Type of Solution, a maximum of twenty (20) points are awarded to Cloud/SaaS solutions and a maximum of twenty (20) points are awarded to In-House solutions. Cloud/SaaS and In-House proposals from a same Vendor will be evaluated independently from each other, as complete and separate packages.

Breakdown of Evaluation Criteria Points:

	Item Points	All Vendors	Cloud/SaaS Solution	In-House Solution
Proposal Overview (All Vendors) – 16%	16	16		
General Requirements (All Vendors) –20%	20	20		
Cost Proposal (All Vendors) – 2%	2	2		
Technical Requirements – General Software Functionality (All Vendors) – 7%	7	7		
Technical Requirements- Cloud/SaaS Solution Only. – 10%	10		10	
Technical Requirements- In-House (behind School Board's Firewall)- Hardware Architecture and Administration Solution Only – 15%	15			15
Technical Requirements- Cloud/SaaS - Hardware Architecture and Administration Solution Only – 10%	10		10	
Technical Requirements – In-House – Software Architecture and Administration Solution Only- 5%	5			5
Technical Requirements- Software Support and Training (All Vendors) – 5%	5	5		
Technical Requirements – Technical Support (All Vendors) – 5%	5	5		
Pricing Section (All Vendors) – 25%	25	25		
Totals		80	20	20
			100	100

C. EVALUATION PROCEDURE TO PROVIDE PREFERENCE TO LOCAL BUSINESS

Local vendor/business means the vendor has a valid business license, issued by a jurisdiction located in Miami-Dade County, with its headquarters, manufacturing facility, or locally-owned franchise located within the legal boundaries of Miami-Dade County, for at least twelve (12) months (or having a street address for at least twenty-four (24) months), prior to the bid or proposal opening date. Post office boxes are not verifiable and shall not be used for the purpose

of establishing said physical address. In order to be considered for local preference, vendors must provide a copy of their business license and the local business affidavit of eligibility with their bid or proposal. A vendor who misrepresents the local preference status of its firm in a proposal or bid submitted to the School Board will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference status for a period of one (1) year. The Superintendent may also recommend that the firm be referred for debarment in accordance with Policy **6320.04**.

If following the completion of initial evaluations, a local firm has submitted a proposal and is competing with a non-local proposer(s), then the local vendor(s) shall have the opportunity to proceed to be considered for further evaluation provided the price is within five percent (5%) of the cost proposed by the non-local vendor, all other technical requirements being equal. In the case of a tie in the best and final proposal between a local business, the tie shall be broken as delineated in Policy **6320**

D. IMPLEMENTATION SCHEDULE

The table below identifies the major milestones in the procurement process:

ID	Milestone	Date
1	Procurement Contract Review Committee	August 8, 2013
2	Mailing of RFP	August 15, 2013
3	Deadline for Questions	August 23, 2013
4	Proposal Submission Deadline	September 12, 2013
5	Evaluation by Selection Committee	September 27, 2013
6	Demonstrations/ Oral Presentations	October 3, 2013
7	Proof of Concept	October 14 through October 31, 2013
8	Final Evaluation	November 6, 2013
9	Recommendation for Award	December 11, 2013

Above dates may vary based on number of submissions moved forward for testing and the availability of ITS resources.

E. ORAL PRESENTATIONS

Upon completion of the above evaluation, rating and ranking, the Committee may choose to conduct an oral presentation(s) with the Proposer(s) which the Selection Committee deems to warrant further consideration based on the best rated proposal(s) providing the best value to the M-DCPS; scores in clusters; significant breaks in scoring; and/or maintaining competition. Selected Proposer(s) must provide a live demonstration of their system program during the oral presentation. Upon completion of the oral presentation(s), the Committee may re-evaluate, re-rate and re-rank the proposals remaining in consideration based upon the written documents combined with the oral presentation to determine the overall ranking

F. PROOF OF CONCEPT

Selected Proposer(s) may be required, **AT NO CHARGE to M-DCPS,** to perform a Proof of Concept (POC) to verify the performance of the product with the M-DCPS platform, network, servers, databases and scalability. A technical evaluation sub-committee to verify claimed functionality and infrastructure compatibility will review the POC. Selected Proposer(s) will perform identical functions during the POC.

Upon signature by the Vendor of M-DCPS Non-Disclosure Agreement, the Selected Proposer(s) will be provided with a minimum of three (3) Case Studies to prepare the POC. The Selected Proposer(s) will have ten (10) business days to install, implement, tune and create required functionality to support a laboratory environment of up to 20 end-user workstations and reporting capabilities. The software will remain on the M-DCPS environment for the technical review sub-committee to evaluate the products functionality for a period not to exceed 30 business days. Selected Proposer(s) will provide all necessary technical and training support to the technical review committee throughout the evaluation. POC results will be reported to the Selection Committee for required compliance to all items in the Required Product Technology section and identification of compliance to Preferred Features items.

Upon completion of the Proof of Concept, the Committee may re-evaluate, re-rate and re-rank the proposals remaining in consideration based upon the written documents combined with the oral presentation to determine the overall final ranking.

The M-DCPS reserves the right to reject any and all proposals submitted. The School Board is not obligated to place any order for any services subsequent to the award of this proposal. The information contained in this proposal is supplied as an aid to the proposer in determining whether it will be able to supply the product and/or services that may be required by the School Board. If a final selection is made, a contract to purchase software, hardware and/or services acceptable to the Attorney for the School Board may be entered into with successful proposer(s). No debriefing or discussion will be held with unsuccessful proposer(s)

VII. TERMS OF CONTRACT

A. SELECTED TERMS AND CONDITIONS

This section contains selected terms and conditions from the M-DCPS Standard Agreement. This RFP is not an offer to enter into a Contract and does not commit the M-DCPS to enter into a Contract, nor does it obligate the M-DCPS to pay for any costs incurred in the preparation and submission of Proposals or in anticipation of a Contract. Contract terms

described in this section are sample provisions only and the M-DCPS reserves the right to require additional or different contract terms. The M-DCPS further reserves the right to negotiate contract terms with specific Proposers. The Term of Contract shall be for an initial three year period. Thereafter, all annual extensions for the software maintenance agreement shall be reduced to writing.

A. Assignment/Modification–This Agreement may not be assigned nor may any assignment of monies due, or to become due to Proposer be assigned without the prior written agreement of the Board. If Proposer attempts to make such an assignment, such attempt shall constitute a condition of default which may be deemed cause for immediate termination of the Agreement by the Board. This Agreement may be amended or modified only by the written and signed consent of all the Parties thereto..

B. Governing Law and Venue - This Agreement shall be governed and construed in accordance with the laws of the State of Florida, venue in Miami-Dade County, Florida. Each party shall be responsible for its own attorney's fees and costs incurred as a result of any action or proceeding under this Agreement.

C. Force Majeure–The Board shall not be liable for its failure to perform hereunder due to contingencies beyond its reasonable control, including but not limited to wars, acts of God, acts of terror, labor disputes, flood, windstorm, earthquakes, acts of civil or military authorities, explosion, riots, sabotage and fire, provided that prompt notice of such delay is given to the other party. The time for performance shall be extended for a period equal to the duration of the Force Majeure.

B. INSURANCE REQUIREMENTS

Proposer will provide evidence of insurance as may be required by the School Board's Office of Risk and Benefit Management, which may include, without limitation, Commercial General Liability, Workers' Compensation, and Automobile Liability insurance coverage. Upon request, the Board, its officers, directors and employees will be named as additional insured. Prior to effective date of this RFP, Proposer is responsible for providing the following:

A. Commercial General Liability Insurance in an amount not less than $1,000,000 combined single limit per occurrence for bodily injury and property damage.
B. Automobile Liability Insurance covering all owned, non-owned and hired vehicles used in connection with the operations of the Vendor, in an amount not less than $1,000,000 combined single limit per occurrence for bodily injury and property damage
C. Workers' Compensation Insurance for all employees of the Proposer as required by Florida Statutes

The School Board of Miami-Dade County, Florida and its members, officers and employees" shall be an additional insured on all liability coverages except Workers' Compensation Insurance.

C. INDEMNIFICATION

To the fullest extent permitted by law, the Vendor shall indemnify and hold harmless the Board, and its employees ("Indemnitees") from and against all claims, liabilities, damages, losses, and

costs including, but not limited to, reasonable costs and attorneys' fees at the pre-trial, trial and appellate levels, arising out of, resulting from or incidental to Vendor's performance under this Agreement or to the extent caused by negligence, recklessness, or intentional wrongful conduct of the Vendor or other persons employed or utilized by the Vendor in the performance of this Agreement. The remedy provided to the Indemnitees by this indemnification shall be in addition to and not in lieu of any other remedy available under the AGREEMENT or otherwise. This indemnification obligation shall not be diminished or limited in any way to any insurance maintained pursuant to the AGREEMENT otherwise available to the Vendor. The remedy provided to the Indemnitees by this indemnification shall survive this AGREEMENT. The provisions of this Section shall specifically survive the termination of this Agreement. The provisions of this Section are intended to require the Vendor to furnish the greatest amount of indemnification allowed under Florida law. To the extent any indemnification requirement contained in this Agreement is deemed to be in violation of any law, that provision shall be deemed modified so that the Vendor shall be required to furnish the greatest level of indemnification to the Indemnitees as was intended by the parties hereto.

DUTY TO DEFEND: The Vendor agrees, at its own expense, and upon written request by the Board, to defend any suit, action or demand brought against the Board on any claim or demand arising out of, resulting from or incidental to Vendor's performance under this Agreement.

D. EQUAL EMPLOYMENT OPPORTUNITY

It is the policy of the School Board that no person will be denied access, employment, training, or promotion on the basis of gender, race, color, religion, ethnic or national origin, political beliefs, marital status, age, sexual orientation, social and family background, linguistic preference or disability, and that merit principles will be followed.

Each firm is requested to indicate its equal employment policy and provide a detailed breakdown by ethnicity, gender and occupational categories of its work force [See ATTACHMENT B – FORM FM-4859 Rev. (02-01)]

E. SMALL BUSINESS ENTERPRISE AND MINORITY/WOMEN BUSINESS ENTERPRISE (M/WBE) PARTICIPATION

From its initiation, the School Board has a strong commitment to SBE and M/WBE participation as part of all related processes and continues to reflect such commitment. The School Board has an active Small Business Enterprise (SBE) Program and Minority/Women Business Enterprise (M/WBE) Certification Program, to increase contracting opportunities for SBE's and M/WBE's. Pursuant to the Board Policy 6320.02, the Board may apply scoring incentives and/or other incentives for SBE/MBE firms responding to this RFP. The Office of Economic Compliance and Business Services must certify all SBE's and M/WBE's, prior to contract award. The application may be accessed through the following link:

http://forms.dadeschools.net/webpdf/3920.pdf

F. LOCAL-VENDOR PREFERENCE POLICY

The School Board of Miami-Dade County, Florida adopted School Board Policy 6320.05, which gives local preference to businesses located in Miami-Dade County, Florida when evaluating the lowest responsible, responsive bid or submittal for the purchase of goods and services, professional and construction-related services, in excess of $50,000 or the current formal bidding threshold set by Statute.

Bidders/Proposers claiming local vendor preference for any bid or submittal must submit an Affidavit of Eligibility for Local Preference (Attachment A) and a copy of its business license with their bid, quote, proposal, reply or response. Your bid/proposal will not be considered for local vendor preference if you fail to provide the approved affidavit at the time of your submittal [(See ATTACHMENT A – FORM FM-7138 Rev. (12-11)]

School Board Policy 6320.05 may be accessed at:

http://www2.dadeschools.net/schoolboard/rules

VIII. ADDITIONAL INFORMATION

A. RFP QUESTION AND ANSWER PROCESS

School Board will allow written requests for clarification of the RFP. All questions must be submitted using the "Post a Question" function associated with the RFP on the School Board website All questions will be consolidated into a single set of responses and posted on the School Board's website.
Questions must be submitted with the following information included in the body of the question. Deviations from this format will not be accepted.

Section number
Paragraph number
Page number
Text of passage being questioned
Question

Any and all questions pertaining to this RFP must be submitted no later than 4:00 p.m. (Local Time) August 23, 2013, via e-mail, to the individual listed below:

Barbara D. Jones, CPPB
Procurement Management Services
Miami-Dade County Public Schools
1450 NE Second Avenue, Room 362
Miami, Florida33132
Telephone: (305) 995-2738
E-mail: bjones@dadeschools.net

The School Board of Miami-Dade County, Florida will issue responses to inquiries and any other corrections or amendments it deems necessary in written addenda prior to the proposal due date. Proposers should not rely on any statements other than those made in this RFP or in any addendum to this RFP. Where there appears to be a conflict between the RFP and any addenda issued, the last addendum issued will prevail.

Responses to questions will be posted to M-DCPS's website and it is the responsibility of the proposers(s) to monitor this site for posting of response(s). The website link is the following:

http://procurement.dadeschools.net/bidsol/asp/ENACT.asp

IX. TERMINOLOGY/ DEFINITIONS

Amendment: A written, official modification to the RFP or to the contract

Attachment: Applies to all forms which are included with the RFP to incorporate any informational data or requirements related to the performance requirements and/or specifications

Proposal Opening Date and Time: This one and similar expressions mean the exact deadline required by the RFP for the physical receipt of sealed proposals at the address listed in the document

Offeror: Means the organization/ company that responds to the RFP by submitting a proposal with prices to provide the elements required for the complete and operational Information Exchange, Reporting and Accountability Tool (Tool).

Contract: Means a legal and binding agreement between two or more competent parties, for a consideration for the procurement of equipment, supplies, and/ or services

Contractor: Means a person or organization who is a successful offeror as a result of an RFP and who enters into a contract

May: Means that a certain feature, component, or action is permissible, but not required

Must: Means that a certain feature, component, or action is a mandatory condition. Failure to provide or comply will result in a proposal being considered non-responsive

Request for Proposal (RFP): Means the solicitation document issued by the School Board in this case, to potential offerors for the purchase of equipment, supplies, and/or services as described in the document.

X. DISCLOSURE OF EMPLOYMENT OF FORMER SCHOOL BOARD EMPLOYEES

Pursuant to School Board Policy 6460, which may be accessed at http://www2.dadeschools.net/schoolboard/rules, all bidders, proposers, and consultants are required to disclose the names of any of their employees who serve as agents or principals for the bidder, proposer or consultant, and who, within the last two years, have been or are employees of the School Board. Such disclosure will be in accordance with current School Board rules, but will include, at a minimum, the name of the former School Board employee, a list of the positions the employee held in the last of their employment with the School Board, and the dates the employees held those positions. See following page and include page in your proposal packages. If non-applicable, please indicate so on the form and return.

Specific Authority: 1001.41(1) (2); 1001.42(22); 1001.43(10) F.S.
Law Implemented, Interpreted or Made Specific: 1001.43(10); 1001.51(14) F.S.
History: THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA
New: 6-18-03

Revised 02/10

DISCLOSURE OF EMPLOYMENT OF FORMER SCHOOL BOARD EMPLOYEES

(PLEASE INCLUDE THIS FORM WITH YOUR PROPOSAL PACKAGE)

Pursuant to School Board Policy 6460, which may be accessed on the school website at www2.dadeschools.net/schoolboard/rules all bidders, proposers, and consultants, are required to disclose the names of any of their employees who serve as agents or principals for the bidders, proposers or consultant, and who **within the last two years**, have been or are employees of the School Board. Such disclosure will be in accordance with current School Board rules, but will include, at a minimum, the name of the former School Board employee, a list of the positions the employee held in the last two years of his or her employment with the School Board, and the dates the employee held those positions.

NAME	LIST OF POSITIONS	DATES EMPLOYEE HELD POSITION
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

FM-3191 Rev. (07-09)

XI. ATTACHMENT A

Miami-Dade County Public Schools

Local Business Affidavit of Eligibility

This declaration is executed under penalty of perjury of the laws of the United States and State of Florida.

THIS AFFIDAVIT IS SUBMITTED IN REFERENCE TO THE FOLLOWING SOLICITATION:

RFQ/RFP/BID/CONTRACT/PROJECT # *(as applicable)*: _____

BUSINESS NAME:		
CONTACT PERSON:		
ADDRESS: *(Include City State & Zip Code)*		
FEIN *(Federal Employer Identification Number)*:		**Length of Time at Address Provided:** _____ **Length of Time Located within the legal boundaries of Miami-Dade County:** _____
BUSINESS STRUCTURE:	☐ Corporation ☐ LLC ☐ Partnership ☐ Sole Proprietorship ☐ Other *(Specify)*: _____	
PHONE:	( )	**FAX:** ( )
E-MAIL ADDRESS:		

ATTESTATION - I understand that:

- In accordance with School Board Policy 6320.05; local business means the vendor has a valid business license, issued by a jurisdiction located in Miami-Dade County, with its headquarters, manufacturing facility, or locally-owned franchise located within the legal boundaries of Miami-Dade County, for at least twelve (12) months (or having a street address for at least twenty-four (24) months), prior to the bid or proposal opening date. Post office boxes are not verifiable and shall not be used for the purpose of establishing said physical address.
- To be considered for local preference, **a vendor must attach a copy of its business license (Local Business Tax Receipt) to this affidavit of eligibility with a bid or proposal.**
- The preference does not apply to goods or services exempted by statute as reflected in Policy 6320, or prohibited by Federal or State law, or other funding source restrictions.
- The application of local preference to a particular purchase, contract, or category of contracts for which the Board is awarding authority may be waived upon written justification and recommendation by the Superintendent.
- The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, from giving preference permitted by law in addition to the preference authorized in this policy.
- The preference established in this policy does not prohibit the right of the Board, or other authorized purchasing authority, to compare quality or fitness for use of supplies, materials, equipment and services proposed for purchase and compare qualifications, character, responsibility and fitness of all persons, firms or corporations submitting bids or proposals.
- The above information may be subject to verification.
- A vendor who misrepresents the local preference status of its firm in a proposal or bid submitted to the School Board will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference status for a period of one (1) year. The Superintendent may also recommend that the firm be referred for debarment in accordance with Policy 6320.04.

BEFORE ME; the undersigned authority, in and for the State of Florida and Miami-Dade County personally appeared _____ who, after being sworn according to law, stated that he or she was authorized to represent _____ and to execute this affidavit on behalf of the said Business Entity and attests, under penalty of perjury, to the above.

SWORN AND SUBSCRIBED BEFORE ME

_____
SIGNATURE OF NOTARY PUBLIC
THIS _____ DAY OF _____, 20____

My Commission Expires: _____
NOTARY SEAL

_____
PRINTED NAME OF AFFIANT

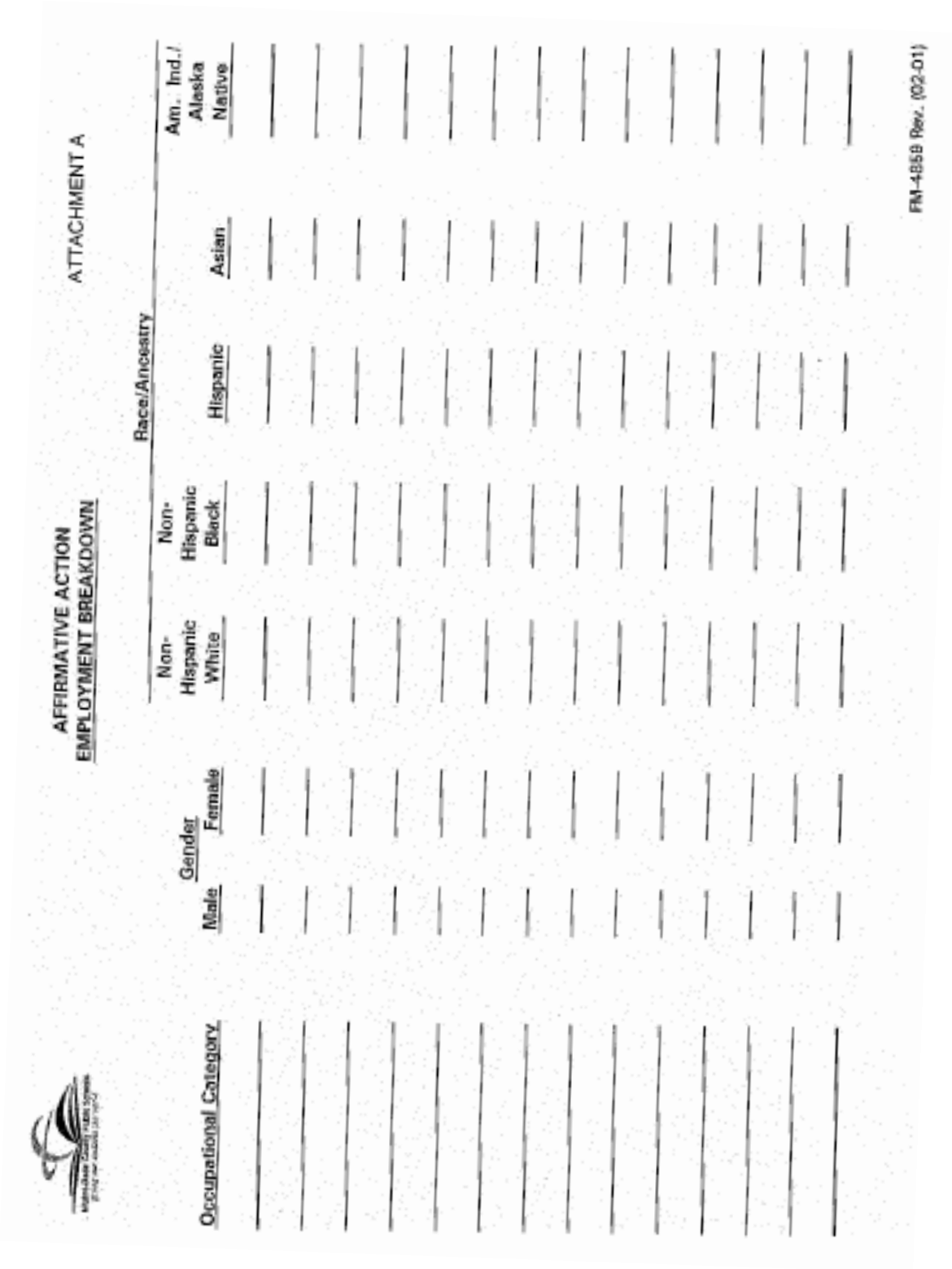
_____
SIGNATURE OF AFFIANT DATE

_____
TITLE

_____
COMPANY NAME

FM-7138 Rev. (12-11)

XII. ATTACHMENT B



AFFIRMATIVE ACTION
EMPLOYMENT BREAKDOWN

ATTACHMENT A

Occupational Category	Gender		Race/Ancestry				
	Male	Female	Non-Hispanic White	Non-Hispanic Black	Hispanic	Asian	Am. Ind./ Alaska Native

FM-4858 Rev. (02-01)