REQUEST FOR PROPOSALS NO. 062-LL10

**PROFESSIONAL DEVELOPMENT AND
AUTOMATED PERFORMANCE EVALUATION SYSTEM**

THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA

I. NAME AND ADDRESS OF REQUESTER

Miami-Dade County Public Schools
Information Technology Services
13135 Coral Way
Miami, Florida 33175

II. PURPOSE FOR REQUEST FOR PROPOSALS

The purpose of this Request For Proposals is to evaluate and select a Professional Development and Automated Performance Evaluation System that will facilitate the evaluation of staff within the various bargaining units of Miami-Dade County Public Schools; provide linkages to professional development offerings (both internal and external) that are identified as being necessary for performance improvement during the course of the evaluation process; and provide a comprehensive single sign-on system for menuing, registration, and documentation of professional development. Proposers may submit a proposal for an automated system which includes professional development and performance evaluation or submit an individual proposal for the automated professional development system or the automated performance evaluation system separately. The evaluation committee will consider all options proposed. Proposals from joint ventures will also be considered.

III. INSTRUCTIONS FOR SUBMISSION OF PROPOSALS

Twenty-two (22) copies of the proposal, one of which must be an original, and one (1) CD containing the entire proposal, must be received by 2:00 p.m. (Local Time) on July 7, 2011, 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 District on or before the stated time and date will be solely and strictly the responsibility of the proposer. The

district 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 “PROFESSIONAL DEVELOPMENT AND AUTOMATED PERFORMANACE EVALUATION SYSTEM”.

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 October 11, 2011. If accepted, notification to the successful proposer will be on or about October 11, 2011. The School Board reserves the right to reject any and all proposals.

IV. SCOPE OF WORK

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

    A. System/Hardware Requirements
    B. OS Requirements
    C. Database Requirements
    D. Security Requirements(LDAP)
    E. Networking Requirements
    F. User/ System Constraints

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 Section V and Attachment A.

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 section V.

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.

V. EVALUATION CRITERIA

The required documentation requested in this section must be submitted with the proposal. Failure to provide required information at the time of proposal submittal shall be considered non-responsive and ineligible for further consideration.

REQUIRED EVALUATION CRITERIA:
Items 1 – 6 are required by software provider(s).

Professional Development System and/or Automated Performance Evaluation Software System proposer shall:

1. Provide documentation of being an established software provider, for a minimum of five years, and proof of both providing and managing software for a K-12 educational sector of similar size and complexity as M-DCPS.

2. Provide most recent company financial statement.

3. Provide at least three written references with names, addresses and contact information (e-mails and addresses) of schools or school systems where the proposer's professional development software is installed and operating. Information concerning the size of the school system and implementation is to be included.

4. Provide technical requirements necessary to effectively run the system. 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 end-user PC minimum and recommended hardware/software requirements and configuration. Include any available scalability testing information to support ability to use with over 60,000 full-time and part-time employees. The District requires that the hardware configurations provided are sufficient to allow the District to operate the proposed software and any releases for a minimum of three (3) years from implementation.

5. Provide documentation showing that the proposed software is a centralized system for all required functions of public school systems. Proposer is requested to submit documentation to support requirement. Flow chart describing architecture or detailed written response is requested.

6. Proposer is required to submit in this section any minimum requirements for desktop hardware, operating system versions, browsers, etc. necessary to support the proposed software solution.

Proposers are requested to respond to questions in the same order as listed in the Request For Proposals

Further Evaluation Criteria – Additional consideration will be given to software based on the following evaluation questions:

SOFTWARE FUNCTIONALITY:

PROFESSIONAL DEVELOPMENT

7. Describe the demographic information the application stores that is consistent with state data reporting requirements found at the following link: http://www.fldoe.org/eias/dataweb/staff_1011.asp

8. Describe what staff information the application stores including, but not limited to:
   a. school assignment
   b. position type
   c. job classification
   d. degrees
   e. certification, including renewal data
   f. mentoring program activity
   g. leadership activities

h. performance history
i. supervision and evaluation history
j. compensation structure
k. out of field waivers
l. endorsement requirements
m. co-teaching requirement
n. clinical supervision qualified
o. performance evaluation system ratings
p. individual professional development plans (IPDP)
q. contract status

9. Describe the staff proficiencies the application stores and links by:
   a. school level (i.e., Pre-k, elementary, middle, high school)
   b. individual staff (i.e., instructional, leadership, support)
   c. job classification
   d. grade level
   e. subject area
   f. group of staff (i.e., teams, lesson study groups, department)
   g. certification/licensure
   h. professional development program (defined by component)
   i. course description/course catalog
   j. benchmarks
   k. curriculum
   l. instructional materials and/or resources
   m. assessment strategies
   n. student needs
   o. clinical supervision qualified

10. Describe how the application categorizes staff proficiencies according to:
    a. skills
    b. knowledge
    c. behavioral characteristics (i.e., effective oral and/or written communication, strong interpersonal skills)

11. Describe how the application supports implementation of a professional development needs assessment survey in order to identify priority proficiency areas for professional development.

12. Describe how the application can edit or create new professional development proficiencies.

13. Describe how the application creates and updates professional development plans at multiple levels (e.g. district, program, and individual) including, but not limited to:
    a. proficiencies required

b. proficiencies mastered, including acquisition date
c. description of how proficiencies will be obtained
d. providing linkage to identified areas of need based upon teacher evaluation, student achievement data, school improvement plans, and/or district strategic priorities.

14. Describe the application's ability to store and view information from professional development offerings taken by a participant including, but not limited to:
    a. offering name
    b. offering dates
    c. offering description
    d. professional development provider
    e. delivery type
    f. course proficiencies provided
    g. course proficiencies obtained
    h. link to job/regulation certifications
    i. performance objectives
    j. flag if professional development offering taken for in-service and/or certificate renewal
    k. professional development credit earned internal and external to school district
    l. alignment to individual professional development plan (IPDP)
    m. program
    n. local performance standards and/or Florida Educator Accomplished Practices
    o. credit /non-credit (meetings)

15. Describe how the application tracks mandatory components of the training including, but not limited to:
    a. completion of built-in assessments
    b. user participation
    c. successful completion of the training
    d. follow-up activities

16. Describe how the application creates and utilizes a template for developing a professional development offering including, but not limited to:
    a. rationale and purpose for the proposed professional development offering
    b. list of the proficiencies embedded in the proposed professional development offering, including state or local standards
    c. a rubric for assessing mastery of each of the associated proficiencies
    d. a link to specific curricular activities, assessments, instructional activities, instructional materials and/or resources for each of the associated proficiencies
    e. brief description of the assessment strategies to be used including, but not limited to:
        i. project

        ii. test
        iii. observation
        iv. a combination of project, test, and/or observation
    f. type of instructional delivery method including, but not limited to:
        i. classroom
        ii. virtual/distance learning
        iii. web-based
        iv. audio conferencing
        v. independent study kit
        vi. project-based program
        vii. coaching models of train the trainer, coach-mentor
        viii. lesson study groups, professional learning communities, and collaboration by teachers
    g. type of physical and/or digital learning environment required
    h. duration
    i. related prerequisites and/or learner assumptions
    j. state standards for professional development
    k. evaluations
    l. employee classification
    m. subject area
    n. grade level
    o. student needs
    p. indicator if training is mandatory (and for whom)
    q. course listing which includes an overview of the class with objectives
    r. link to professional development materials (e.g. manuals, videos, handouts)
    s. link to pre- and/or post-assessments and professional development evaluations
    t. local performance standards and/or Florida Educator Accomplished Practices

17. Describe how the application creates professional development evaluations including, but not limited to these question types:
    a. single line of text
    b. multiple lines of text
    c. multiple choice by drop down
    d. rating scale by drop down
    e. project rubric

18. Describe how the application creates and updates pre-approved professional development instructors, proposers of PD, and school site professional development liaisons and district facilitators.

19. Describe how the application provides an ability to create and update pre-approved professional development locations.

20. Describe how the application creates an electronic catalog of professional development offerings.

21. Describe how the application searches and views professional development offerings on a variety of parameters including, but not limited to:
    a. AYP status
    b. benchmarks
    c. certificate categories
    d. credit type
    e. employee classification
    f. key words
    g. grade level
    h. location
    i. proficiencies
    j. school
    k. school level
    l. school type
    m. student needs
    n. subject area
    o. timeframe
    p. endorsement courses
    q. compliance courses
    r. co-teaching compliance
    s. local performance standards and/or Florida Educator Accomplished Practices
    t. course availability (e.g. seats available)
    u. PD program type (e.g. new teacher program)
    v. Contract status

22. Describe how the application searches and views professional development offerings whether offered by the school district.

23. Describe how the application schedules professional development offerings including, but not limited to:
    a. scheduling of multiple sessions of the same activity
    b. scheduling a new session of a previously offered activity
    c. assignment of pre-approved locations
    d. assignment of pre-approved instructors
    e. setting registration as open enrollment or pre-approval
    f. credit/ non-credit (meetings)

24. Describe how the application creates professional development evaluations anonymous or named.

25. Describe how the application allows users to register online from any Internet, browser-based device including, but not limited to:

a. ability for users to register or seek approval to register for all courses online
b. ability for users to unregister from any course for which they have registered
c. ability for administrator to register another employee and for administrator to view report of teacher enrollment in professional development activities
d. ability to notify administrator if user unregisters for a class for which the administrator registered that person
e. ability for users to change their password online
f. ability for users to recover their password via email
g. ability to block users from double-booking events
h. ability for session instructor or facilitator to add participants to a session
i. ability for administrator to bulk enroll and cancel participants from sessions
j. ability to define registration methods (e.g. open registration, restricted, bulk registration)
k. ability to set publish times (when the session becomes available for registrations) and close registration times (e.g. two hours or one week before the start of the session)

26. Describe how the application manages session attendance and results including, but not limited to the ability to:
    a. view roster of all registered participants
    b. print preformatted scan able sign-in sheet
    c. add walk-in attendees
    d. submit session attendance online
    e. submit final assessment results
    f. assign mastery of proficiency levels
    g. submit seat time online

27. Describe how the application provides a maintenance and notification system to support compliance with time lines for submission of but not limited to:
    a. attendance records
    b. sign-in sheets
    c. awarding of grades
    d. reminders (e.g. upcoming class, homework due, evaluation or assessment due)
    e. low enrollment numbers
    f. pending cancellations or actual cancellations
    g. status changes (e.g. date or location changes, grade change, registration status change)
    h. conditional denial of credit alert to selectable participants (e.g. incomplete work or missing sign-in sheets)

28. Describe how the application provides a capability to collect evaluation results from a professional development offering.

29. Describe how the application provides for a hierarchy of access and permission levels for viewing, proposing, approving, registration, editing, creating, and cancelling.

30. Describe how the application provides linkage to a Sharable Content Object Reference Model (SCORM) version 1.2 or above compliant Learning Management System (LMS).

31. List the HR software packages which this application readily interfaces.

Professional Development Workflow Capabilities

32. Describe how the application offers an ability to create, update, or remove workflows based on district review and approval requirements including, but not limited to the following types:
    a. lesson plans
    b. professional development plans
    c. instructional materials and/or resources
    d. assessment items
    e. documents

33. Describe how the application designates evaluation criteria for each step of the workflow review and approval process.

34. Describe how the application completes the entire workflow process from submission, through review and approval, in the system.

35. Describe how the application views and prints reports on the status of the workflow process.

36. Describe how the application offers the capability to view the status of the workflow process from the item under review.

37. Describe how the application creates new workflow processes.

38. Describe how the application provides a calendar including, but not limited to the ability to:
    a. create individual, course section, or subject area calendars including, but not limited to:
        i. student
        ii. teacher
        iii. professional development
    b. add, update, or remove assignments or events (i.e. assessments) on the calendar
    c. add, update, or remove recurring assignments or events

39. Describe how the application provides an ability to open multiple windows concurrently for both inquiry and updating across any combination of components without losing any data previously entered on an open screen.

40. Describe what level of basic computer skills is required by individuals to utilize this application.

41. Describe how the application offers an ability to manage the system by subgroups such as multiple schools, multiple school districts, etc.

42. Describe how the application stores assessment information longitudinally. For how many years?

AUTOMATED PERFORMANCE EVALUATION

43. Describe how the application provides the ability to create different evaluation models based upon local requirements and agreements.

44. Describe how the application provides the ability for multiple levels of signoff/agreement to the indicators being used for the evaluation.

45. Describe how the application has the ability to “lock” an evaluation tool for the duration of a school year and then automatically determine results based on local and state data.

46. Describe how the application provides the ability to update annual results data in mass.

47. Describe how the application provides for the manual entering of employee specific observations/data during the course of an evaluation cycle.

48. Describe how the application provides the ability to roll-up results to an overall rating of an individual being evaluation.

49. Describe how the application provides the ability to create observation and follow-up schedules based upon contract status and/or observation findings and evaluation ratings?

50. Describe how the application provides the ability to capture and report on findings from multiple observations during the year?

    a. By date?
    b. By observer?
    c. By standard observed?
    d. By summary of the observation findings
    e. Across multiple observations?

51. Describe how the application provides the ability to generate alerts and messages based on due dates for observations, follow-up schedules, and required activity timelines?

52. Describe how the application can handle the indicators/measurements being used in an evaluation tool be annually modified as District and State requirements vary.

53. Describe how the application can handle trend data to be displayed on the evaluation tool for the identification (both automatic and manual) to assist in the selection of measures to be used.

54. Describe how the application can handle weights assigned to individual measures to customize each evaluation model to individual staff.

55. Describe how the application can handle evaluation results to be displayed for an individual over time.

56. Describe how the application can handle professional development opportunities/recommendations be automatically generated by the evaluation tool based upon end of year results.

57. Describe how the application provides the ability to automatically generate the evaluation tool based upon leading indicator data by professional development opportunities/recommendations?

58. Describe how the application provides the ability for the Individual Professional Development Plan (IPDP) to be generated, maintained, searched, and reported upon through the system, as follows:

    a. generate an initial annual IPDP based upon the individual's performance on each of the local performance standards and learner progress data from the annual evaluation;
    b. track the completion of professional development activities on the IPDP through the year;
    c. track changes made to the IPDP throughout the year:
        i. by the staff member
        ii. by the supervisor/assessor
        iii. based upon recommendations emerging from observations, leading indicator data, and/or support dialogues
    d. provide alerts/messages regarding approaching due dates, missing activities/incompletes, or status changes (e.g., credit award, unsatisfactory, or withdrawal) on professional development activities linked to the IPDP to staff and their supervisors/assessors;
    e. generate additional recommendations for professional development during

the year based upon
    i. additional course offerings added to course catalogue
    ii. leading indicator student data
    iii. supervisor recommendatiosn
    iv. staff request

59. Describe the application's ability to report on support/assistance provided to staff members to support and improve performance?
    a. By date of support provided?
    b. By type of support provided?
    c. By summary of support dialogue?
    d. By follow-up timelines?
    e. By required activities?
    f. By other criteria that may be required

60. Describe the application's ability to capture and report on the observation ratings assigned to staff by an individual assessor?
    a. Across multiple staff?
    b. Across multiple years?

61. List the HR software packages which this application readily interfaces.

Automated Performance Evaluation Workflow Capabilities

62. Describe how the application creates, updates, or removes workflows based on district review and approval requirements including, but not limited to the following types:
    a. lesson plans
    b. professional development plans
    c. instructional materials and/or resources
    d. assessment items
    e. documents

63. Describe how the application designates evaluation criteria for each step of the workflow review and approval process.

64. Describe how the application completes the entire workflow process from submission, through review and approval, in the system.

65. Describe how the application views and prints reports on the status of the workflow process.

66. Describe how the application has the capability to view the status of the workflow process from the item under review.

67. Describe the ability to create new workflow processes.

68. Describe how the application provides a calendar including, but not limited to the ability to:
    a. create individual, course section, or subject area calendars including, but not limited to:
        i. student
        ii. teacher
        iii. professional development
    b. add, update, or remove assignments or events (i.e. assessments) on the calendar
    c. add, update, or remove recurring assignments or events

69. Describe how the application provides an ability to open multiple windows concurrently for both inquiry and updating across any combination of components without losing any data previously entered on an open screen.

70. Describe how the application provides a system that requires only basic computer skills by individuals.

71. Describe how the application manages by subgroups such as multiple schools, multiple school districts, etc.

72. Describe how the application stores assessment information longitudinally. For how many years?

SOFTWARE ARCHITECTURE AND ADMINISTRATION:

Technical Requirements

73. Describe how the software application will provide end-user authentication using credentials from the M-DCPS Active Directory database in the Dadeschools.net domain. Describe if this can this be accomplished via an LDAP connector to the Dadeschools.net Active Directory database.

74. Describe the software solutions security protocols for clients, transactions and servers. Provide documentation detailing how this is achieved.

75. Describe how the software application provides the District with the ability to customize and add data fields.

76. Describe how the software application utilizes a centrally managed software version upgrade methodology, (i.e., version control capability).

77. Describe the application's ability to accommodate multiple levels of security

access such as parent, school, and administrator levels.

78. Describe how the product integrates with Microsoft SharePoint Server.

79. Describe how this product allows for off-line (e.g., home) and online use (i.e., anytime, anywhere access).

80. Describe how the database is normalized to restrict the duplication of data.

81. Describe the administrative levels and their privileges. (Example: Rights to District information, school information, classroom information)

82. Describe how the application utilizes a protected Web site for each of the administrative levels you have described above.

83. Describe how administrators manage, edit and filter user lists.

84. Describe how the software handles automated file transfers.
    Currently, the District supports FTP using PGP encryption or a script that can send a file to a SSL website. Do you support either transfer method? If using an SSL Site, do you supply the scripts?

85. Describe how the application provides the ability to securely import and export data, documents, files, and information by individuals and systems including, but not limited to:
    a. data (i.e. student, staff, grades, assessment, etc.)
    b. documents
    c. images (i.e. graphics, photos, etc.)
    d. multi-media materials (i.e. videos, podcasts)
    e. benchmarks
    f. subjects
    g. courses
    h. course descriptions
    i. lesson plans
    j. instructional materials and/or resources including from multiple publishers
    k. curriculum guides
    l. assessment items
    m. assessment item banks
    n. rubrics
    o. professional development information\

86. Describe how the application provides an ability to export data in a variety of formats including, but not limited to:
    a. comma separated value (CSV)
    b. PDF
    c. HTML

d. Text
e. Spreadsheet

87. Describe how the application receives data using a variety of mechanisms including, but not limited to:
    a. web forms
    b. scanning
    c. automated batch processing

88. Describe how the application supports a full replacement of the contact information on a daily basis through an automated process requiring no personnel involvement? Are thefiles processed immediately upon arrival? What is the estimated time to process 60,000 records? Do you retain all of the subgroups already established? Does it repopulate the subgroups that individuals have created?

89. Describe how the application can take a daily delta change file instead of a full file update to create a delta file from a full transmission that to be sent. Are the files processed immediately upon arrival? What is the estimated time to process 50,000 updates?

90. Describe how the application allows for a file containing Employee I.D.'s to be sent daily through an automated process requiring no personnel involvement.

91. Please provide a system flow on how data will be uploaded and processed daily and weekly.

92. Describe how the application's data integrity tools eliminate duplicate records.

93. Describe how the application produces an error log from data imports.

94. Describe how the application subscribes, unsubscribes, and receives notifications about events in the system including, but not limited to:
    a. new or revised data
    b. new or revised documents
    c. new or withdrawn students
    d. professional development registrations, reminders, and cancellation notifications
    e. workflow status
    f. system modifications
    g. security updates
    h. database performance issues
    i. application performance issues
    j. hardware performance issues
    k. network performance issues

95. Describe how the application provides secure, role-based access to the system, database and to confidential information in accordance with district, state, and/or federal rules or regulations for multiple types of users including, but not limited to:
    a. Administrators
    b. Teachers
    c. Students
    d. Parents
    e. technical support/administrators

96. Describe how your system routes packets to ensure it does not overburden the local area communication network.

97. Describe how the application includes database maintenance tools to allow for global edits, adds, deletes, etc.

98. Describe how the application establishes user warnings for calls issued at unusual times or for unusual volume.

99. Describe what type of redundancy is in place in case a site goes down. Do all calls originate from one location?

100. List standard reports that are available within the application. Include standard charts and graphs. (i.e. notification history, types of call activity and attendance notification report).

101. Describe how the application can view, print and save reports.

102. Describe how the application can generate a standard status report for each notification campaign.

103. Describe how the application produces multi-level reports (i.e., school based, region based and district level)

104. Describe how the application allows for SSRS reporting and direct connectivity to the database for ad-hoc reporting.

105. Describe how the application supports Simplified Object Access Protocol (SOAP) standard for exchange of information, complies with the World Wide Web Consortium's (W3C) Web Content Accessibility Initiative (WAI) and with Section 508 standards, supports a variety of interoperability standards including but not limited to School Interoperability Framework (SIF) and Supports Secure Socket Layer (SSL) encryption.

106. Describe how the application provides performance, audit, and security logs including, but not limited to:
    a. Hardware

b. Network
c. Application
d. database

<u>If proposing a non-ASP implementation</u>:

107. Describe how the application supports hardware requirements including, but not limited to:
    a. a variety of hardware environments
    b. n-tiered, easily scalable open architecture
    c. virtualization

108. Describe how the application supports application requirements including, but not limited to:
    a. browser-based components
    b. compliance with browser standards
    c. compliance with ADA
    d. copy and paste function across components/modules
    e. spell check, including ability to disable for assessments as needed
    f. grammar check, including ability to disable for assessments as needed
    g. prepopulates fields, where appropriate
    h. drop-down, radio button, or checklist of appropriate values for each validated field
    i. note fields
    j. display of data received from other systems

109. Describe whether the software system is either a thin client, centralized, Web-based system utilizing Microsoft IIS 7 and SQL Server 2008 (the current M-DCPS environment) **or** the vendor must include in their proposal hardware/software cost necessary to operate the product within M-DCPS.

110. Describe how the system will back up or store archived data, handle a full or incremental backup on a scheduled/ ad hoc basis, and restore from said backups.

111. Describe how the application can scale to support archiving in accordance with legal retention and district research requirements including, but not limited to:
    a. Data
    b. Documents
    c. Images
    d. multi-media materials

112. Describe the application's ability to support for data export/import permitting interface to M-DCPS applications including the existing WISE (Web Interface for Special Educators) application.

113. Describe whether the software solution has been utilized in a VMware environment.

114. Describe the application's ability for administrative batch updates to back-end database (e.g., write SQL queries against the database that allow for changes in certain fields without having to use the front-end interface).

115. Describe how the software will utilize an Open Architecture System database (e.g., OLAP and ODBC compliant.)

116. Describe how the system will support database requirements including, but not limited to:
   a. one time entry of data for use throughout the system
   b. data validation including, but not limited to:
      i. verification
      ii. range checks
      iii. table of valid entries
      iv. allowances for online editing/validation of all update transactions
   c. identification of data element that must be tracked for changes
   d. identification of security at data element level
   e. a year-end roll over process

117. Describe how the software solution allows for seamless integration with existing SQL server M-DCPS databases to allow automatic data import and export.

<u>If proposing an ASP implementation:</u>

118. Describe the capabilities of the vendor to provide managed hosting services.

119. Describe the software solutions security protocols for client, transactions, and server. Provide documentation detailing how this is achieved.

120. Describe your hosting and network Service Level Agreement commitments.

121. Describe system redundancy provisions in the case of site failure.

IMPLEMENTATION STRATEGY:

122. Describe how the software system could be implemented in 3-month deliverables. Provide a detailed strategy with timelines. Provide examples of staff to be utilized.

123. Describe how, if awarded this RFP, the vendor will have the entire system in place by the beginning of the 2012-2013 school year.

124. Describe in detail how the vendor will provide assistance to the project manager for this engagement.

125. Describe how the vendor will conduct regular on-site project status meetings between M-DCPS project managers and vendor project management level staff.

126. Describe how the vendor will provide on-site project team for year one of the contract to ensure vendor recommended policies, procedures, and infrastructure are supported for overall system wide adoption and success.

127. Describe and produce the evidence of mature project management methodologies.

128. Describe how the vendor will adhere to organizational Change Management methodologies to ensure effective implementation, seamless updates, and minimal disruptions to services.

129. Describe how the vendor will report regularly on status of deliverables.

SOFTWARE SUPPORT AND TRAINING:

(Note: The District will add a first-level contact person within the District who will need a number for direct access to the second-tier provider.)

130. Describe how the system support will be provided and describe the ability to access online (intranet/internet) software and support services including, but not limited to the ability to:
    a. submit questions
    b. inquire about the status of help desk requests
    c. receive software and documentation updates

131. Is your company capable of providing toll- free telephone second-tier support Monday through Friday 7:00 a.m. EST to 7:00 p.m. EST? Is there a support website?

132. Describe how this software handles updates, patches, fixes. Are the costs included in maintenance agreement? Vendor is requested to detail associated costs, if not.

133. Describe how to implement software and hardware upgrades without loss of configurations, customizations, data, or documents.

134. Describe the average support call-back time.

135. Describe the average problem-resolution time.

136. Describe how the system will provide the following support materials and or support sites for the application.
    a. FAQs
    b. procedural "how to" documentation
    c. knowledge base
    d. on-demand videos
    e. technical manuals
    f. documentation search including, but not limited to by:
        i. subject area
        ii. key word, meta tag, or phrase
        iii. index
        iv. table of contents
        v. file type
    g. installation procedures
    h. database documentation (i.e. diagrams, metadata dictionaries)
    i. dataflow documentation
    j. development standards
    k. hardware/network configurations
    l. error resolution information

137. Describe how the vendor will provide consulting and guidance on the application and how they will provide system support.

138. Describe what is and what is not covered in the support contract.

(Note: The District does not have a preference for a specific training model. The District has adequate training facilities but these facilities must be scheduled in advance.)

139. Describe how training will be provided. Is it role-based, train-the trainer, Web-based, etc.? Proposer is requested to supply a detailed training plan.

140. Describe how the application accesses a comprehensive knowledge base along with built-in tutorials and help screens.

141. Describe any costs that may not be covered by the initial purchase or support contract related to this application or its maintenance.

VI. COST SECTION: Proposer(s) must specify at least one licensing model per price proposal. Prices must be based on the following information:

<u>Price Proposal Sheets:</u>

Proposal 1: District-Wide Enterprise Level **Perpetual License**

Item	Description	Unit	License Cost ($)	Annual Maint./Support Cost ($)	Annual Maint./Support Cap (%)
	Training Cost (include description of training paradigm)		$	N/A	N/A
	Installation Implementation Services		$	N/A	N/A
	Hardware from Item 55 of Software Architecture and Administration in requirements		$	$	%
	Discount		$	$	N/A

Proposal 2: District-Wide **Subscription (Per Year)**

Item	Description	Unit	License Cost ($)	Annual Maint./Support Cost ($)	Annual Maint./Support Cap (%)
	Training Cost (include description of all training paradigm)		$	N/A	N/A
	Installation Implementation Services		$	N/A	N/A
	Hardware from Item 55 of Software Architecture and Administration in requirements		$	$	%
	Discount		$	$	N/A

VII. TERMS OF CONTRACT

The purpose of the proposal is to establish a contract(s) at firm unit prices for the items listed from date of award moving forward indefinitely. The successful proposer(s) agrees to this condition by signing its proposal.

If selected, the proposer(s) shall agree to hold harmless, indemnify and defend the indemnities, as hereinafter defined, against any claim, action, loss, damage, injury, liability, cost or expense of whatsoever kind or nature including, but not by way of limitation, attorney's fees and court costs arising out of bodily injury or damage to tangible property arising out of or incidental to the performance of the services of this Request for Proposals by or on behalf of the proposer, excluding only the sole negligence or culpability in the indemnities. The following shall be deemed to the indemnities: The School Board of Miami-Dade County, Florida and its members, officers and employees.

The School Board of Miami-Dade County, Florida, reserves the right to terminate any contract resulting from this proposal in the event that the service rendered does not comply with the provisions of the proposal and/or is not satisfactory and proper, as determined by the School Board
Proposers.

VIII. INSURANCE REQUIREMENTS

At the time an award is made, the successful proposer shall be responsible for providing the School Board with certificates of insurance, which indicate that insurance coverage has been obtained and meets the requirements as outlined below:

Professional Liability Insurance in the name of the proposer with limits of liability not less than $1,000,000 per wrongful act.

1. Commercial General Insurance on a comprehensive basis in an amount not less than $300,000 combined single limit per occurrence. The School Board of Miami-Dade County, Florida, its employees and agents must be listed as an additional insured on the policy.

2. Worker’s Compensation Insurance for all employees of the proposer as required pursuant to the provisions of § 440, Florida Statutes. Each insurance policy evidencing the insurance required hereunder shall bear

the appropriate endorsements whereby the insurance carrier waives any rights of subrogation acquired against the Board and the Students by reason of any payment under such policy and shall provide that such insurance carriers shall notify the Board in writing at least (30) days prior to any cancellation, termination, non-renewal or modification to the individual/firms policy(ies) required under this agreement.

Upon the execution of this agreement, the individual/firm shall furnish to the Board's Office of Risk and Benefits Management with Certificates of Insurance evidencing the individual/firms insurance coverage is consistent with the terms of the agreement. The individual/firm shall also provide copies of the policies to the Board. The individual/firm shall also provide the Board with renewal or replacement Certificates of Insurance no less than (30) days prior to cancellation, termination or modification. The individual/firm shall be in material breach of this agreement if the individual/firm fails to obtain replacement insurance coverage prior to the date in which coverage is terminated or expires. In this event, the Board may terminate this agreement without further liability to the individual/firm. Additionally the individual/firm shall be liable to the Board for any and all damages incurred due to the individual/firm failure to perform the agreement terms.

IX. INDEMNIFICATION

The individual/firm(s) hereby agrees to indemnify, hold harmless and defend the Board, its officers, agents and employees individually and collectively from and against all liabilities, obligations, losses, damages, penalties, interest, claims, actions, assessments, fines, suits, demands, investigations, proceedings, judgments, orders or injuries, including death to any, or damage, of whatever nature, to any property and all costs including court costs and attorneys' fees, and disbursements, whether suit is instituted or not, and if instituted, at all tribunal levels (wherever raised by the parties hereto or a third party) imposed on, or incurred by or asserted against the Board or any of them arising out of or in connection with or based directly or indirectly upon (a) the individual/firms' directors, officers, employees, agents, subcontractors or representatives, of their duties and obligations under or pursuant to this agreement, including without limitations, the failure to maintain insurance or notify the Board; (b) any material breach of this agreement by the individual/firm(s), (c) false or inaccurate representation or warranty made by or on behalf of the individual/firm(s), and (d) any act or omission, negligence, or intentional acts of the individual/firm(s), or any of the individual/firms' directors, officers, employees, agents, subcontractors or other representatives.

X. EQUAL EMPLOYMENT OPPORTUNITY

1. 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. (**ATTACHMENT B)**

2. Minority/Women Business Enterprise (M/WBE) Participation

The School Board has an active Minority/Women Business Enterprise (M/WBE) Program, to increase contracting opportunities for M/WBE's. In keeping with this policy, if a minority firm, which is Hispanic, Woman or African American-owned and operated, is to perform a scope of work, provide documentation to substantiate the experience of the M/WBE and its staff in providing this type of service. The Office of Compliance and Business Services must certify all M/WBE's, prior to contract award. The M/WBE Application may be accessed through the following link:

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

XI. EVALUATION OF PROPOSALS

Proposals will be reviewed and evaluated by a 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 districts requirements, after demonstrations, may be required to provide, at no charge to the District, a Proof of Concept (POC) to verify and demonstrate the claimed functionality and infrastructure, and scalability of product as stated in the proposal.

Evaluation process for the proposal is as follows:

TIER I: CONFORMANCE:

Proposals submitted will be reviewed for conformance to Required Items 1-6 specified in **Section V. Required 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 1 through 141 detailed in Section V and

cost proposal sheets detailed in Section VI. Further Evaluation criteria points:

Software Functionality –30%

Proposals will be evaluated against the responses provided by the proposer to Questions 7 – 72

Software Architecture and Administration – 15%

Proposals will be evaluated against the responses provided by the proposer to Questions 73 – 121

Implementation Strategy – 10%

Proposals will be evaluated against the responses provided by the proposer to Questions 122 – 129

Software Support and Training – 15%

Proposals will be evaluated against the responses provided by the proposer to Questions 130 – 140

Costs as provided in proposal per XIII – Price Proposal Sheets. – 20%

Proposals will be evaluated against the Price Proposal Sheets and response provided by the proposer to Question 141.

Qualifications and Experience – 10%

Proposals will be evaluated against the questions set out below.

A. Does the proposer have knowledge of K-12 Professional Development field and experience in delivering product to meet this market's needs?
B. How well has the vendor performed on similar contracts through evidence of the references submitted or if applicable for similar contracts awarded previously by the District?
C. How experienced are the personnel proposed for implementing the services on this proposal?

TIER III: 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 District; 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.

TIER IV: 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 the identical functions during the POC.

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. 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 District 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).

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

- Two principals selected from elementary, K-8 center, middle, or senior high school;

- Two teachers selected from an elementary, K-8 center, middle, or senior high school;
- One administrator from Curriculum, Instruction and School Improvement;
- One administrator from the Professional Development Data Center;
- Two administrators from Human Resources;
- One administrator from Instructional Technology;
- One administrator from Assessment and Data Analysis;
- One administrator from School Operations;
- Two administrators from Information Technology Services;
- A representative from the United Teachers of Dade;
- A representative from Management and Compliance Audits (non-voting);
- A representative from the Office of Compliance and Business Services; and
- An administrator from Procurement Management Services (non-voting).

The technical review sub-committee will consist of the following or their appointed designees:

- Three administrators from Information Technology Services.

XII. IMPLEMENTATION SCHEDULE

The planned implementation schedule for the proposal process is as follows:

Procurement Contract Review Committee……..…….April 21, 2011

Mailing of RFP…….……June 6, 2011

Deadline for Questions……..……..….June 20, 2011

Opening of Proposals……..……July 7, 2011

Evaluation by Selection Committee……..July 20, 2011

Demonstrations/Oral Presentations…….July 25, 2011

Proof of Concept……August 10, 2011- September 20, 2011

Evaluation by Selection Committee……..……..…September 22, 2011

Recommendation for Award……..October 11, 2011

XIII. ADDITIONAL INFORMATION

Any and all questions pertaining to this RFP must be submitted no later than 4:00 pm (Local Time) June 20, 2011, 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, Florida 33132
Telephone: (305) 995-2738
E-mail: bjones@dadeschools.net

The School Board of Miami-Dade County, Florida will issue responses to inquires 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

M-DCPS Board Approved Required Component Number Structure

1. Components are defined by the state: http://www.fldoe.org/eias/dataweb/database_1011/sfappendd.pdf
    a. All PD Offerings must link through a pre-approved component
    b. Access and Permissions
        i. Access can be restricted to work location numbers or un-restricted
2. Fields required for component storage and retrieval
    a. Component ID Number (PK [Primary Key]) (x-xxx-xxx)
    b. Title
    c. Implementation Period (Master In-service Plan)
    d. Approval Type (School Based, Department Based, General Use)
    e. If Department Based, Location Numbers that can access component
        1. Separate table
            a. Component number (PK)
            b. Location Number (PK)
    f. Total maximum MPP (Master Plan Points) available for this component (1-120 MPP)
    g. General Objectives text
    h. Specific Objectives (numbered)
        1. Separate table
            a. Component ID number (PK)
            b. Specific objective ID number (PK)
            c. Text
    i. Activities (numbered)
        1. Separate table
            a. Component ID number (PK)
            b. Activity ID number (PK)
            c. text
    j. Follow-up (numbered)
        1. Separate table
            a. Component ID number (PK)
            b. Follow-up ID number (PK)
            c. text
    k. Evaluation (numbered)
        1. Separate table
            a. Component ID number (PK)
            b. Evaluation ID number (PK)
            c. Text

l. Hyperlink to webpage showing specific component (component ID)

3. Created in the PD menuing system and exported to SDES and then to the STATE
    a. Approval process (submit, review, approve)
        i. Originator (Employee number, name, contact information)
        ii. Component Approval log (dates and times of all approval status changes showing name of the person making the change)
        iii. Internally communication system between proposer and approver
            1. Approver/Proposer Log
        iv. Approval Status
            1. Denied, Cancelled, Pending Review, Pending Approval, Approved

<u>Course Templates Creation and Use</u>

1. Every course template must start with a single defined component.
2. Selection of the component populates the component related fields of the course template in a selectable/modifiable format.
3. Fields required for course creation, storage, and retrieval
    a. Course Template ID Number (PK)
    b. Component
    c. Title
    d. Proposer employee number
    e. General Use [Y/N]
    f. Follow-up Assignment
    g. Audience (Teacher, Paraprofessional, Student Services)
    h. MPP
    i. Contact Hours
    j. Independent Hours
    k. Sunshine State Standards (SSS)
        i. Separate table
            1. Component ID number (PK)
            2. SSS ID number (PK)
            3. Text pulled from SSS table
    l. Competency-Based Curriculum (CBC)
        i. Separate table
            1. Component ID number (PK)
            2. CBC ID number (PK)
            3. Text pulled from CBC table

m. Pre-requisites
n. Evidence-based Research
o. Delivery Method
p. Learning Facilitation Statement
q. Student Impact Statement
r. Follow-up Method (pre-loaded choices)
s. Evaluation Method)pre-loaded choices)
t. Student Evaluation Method (pre-loaded choices)
u. Activity Content
v. Focus
w. Target Audience
x. IPEGS standards
    i. Separate table
        1. Course Template ID number (PK)
        2. IPRGS ID number (PK)
        3. Text
y. FEAP (Florida Educator Accomplished Practices)
    i. Separate table
        1. Course Template ID number (PK)
        2. FEAP ID number (PK)
        3. Text
z. Hyperlink to webpage showing specific component (course template ID)

4. Restrictions on Independent Hours and Follow-up Assignments:
    a. Independent hours cannot exceed 25% of the contact hours with an allowed minimum of 1 independent hour (zero independent hours is valid) (an override is available)
    b. There must be a follow-up assignment must have an entry with entry directions showing the requested number of independent hours and asking the proposer to justify the assigned independent hour with this entry
5. Creation and Approval Process, Communication, and Record Keeping:
    a. Approval process (submit, review, approve)
        i. Originator (Employee number, name, contact information)
        ii. Approval log (dates and ID of all activity)
        v. Internally communication system between proposer and approver
            1. Approver/Proposer Log
        iii. Status and Status Changers
            1. Pending Review, Pending Approval, Approved)
6. Other fields not included unlimited

   a. Fields can be added as needed by end user
7. Guidelines for MPP, contact hours, Independent hours:
   a. Contact hours and independent hours must equal MPP
   b. MPP cannot exceed the component maximum MPP
8. Search Function: Course Template Menu can be searched by
   a. Proposer
   b. Component
   c. Key Word(s)
      i. Title
      ii. Description
   d. Department location number
9. Ability to attach external files to the course template for download and/or viewing (See Participant's Views)
10. Course Template Ownership
    a. Course Owner has ability to give access to defined users
11. There is the ability to schedule individual or multiple course sessions or no sessions from the course template. (See next Course Sessions)
12. Course templates status
    a. Pending Review, Pending Approval, Approved, Denied, Cancelled
13. Course Template Approval log (dates and times of all approval status changes showing name of the person making the changes)
14. Internal communication system between proposer and approver
    a. Approver/Proposer Log

<u>Course Sessions Creation and Scheduling</u>

1. There is the ability to schedule individual or multiple course sessions or no sessions from the course template. Course Session information is stored in separate tables.
2. Course Templates that contain Course Session information will be submitted for approval for both the template and session at the same time (one submission for both)
   a. Approvals are separate. The approver can deny the course session(s) but cannot approve a course session(s) unless the course template is also approved.
3. Fields
   a. Course Session ID Number (PK) (component and next auto sequence for this component)
   b. Course Template ID Number

c. Additional Title
d. Proposer employee number
e. Instructor employee number
f. Facilitator employee number
g. Department contact information
    i. Name
    ii. Phone
    iii. E-mail
h. Participant thresholds (minimum, maximum, wait list)
i. Role restrictions (administration, instructional, non-instructional)
j. Fee associated
b. Stipends [Y/N]
c. Substitute funding [Y/N]
k. Start date
l. End date
m. Meeting dates
n. Separate table
o. Course Session ID number (PK)
p. Meeting date ID number (PK)
d. After Hours [Y/N]
q. Additional Meeting Information
r. Special Instructions
s. Activity location
t. Name of facility
u. Address
v. Phone numbers
w. Room numbers
x. Hyperlink to webpage showing specific component (course session ID)
y. Seats minimum (number)
z. Seats maximum (number) (not less than min)
aa. Seats waiting (number)
bb. Sign-in Sheets received (Y if the sign-in sheets are imaged)

4. Course Session status
    a. Pending Review, Pending Approval, Approved, Denied, Cancelled
5. Course Session Approval log (dates and times of all approval status changes showing name of the person making the change)
6. Course Session Activity log (dates and times of all course session changes showing name of the person making the changes that were made after the

course session was approved) (i.e. date changes, instructor changes, location changes)

7. Internal communication system between proposer and approver
    a. Approver/Proposer Log
8. Ability to attach external files to the course session for download and/or viewing. Any attachments from the course template can be appended or replaced with this attachment. (See Participant's Views)

<u>Menu Options and Accessibility</u>

1. There is the ability to modify the menus, page layouts, and other elements of the menuing system without re-coding the system.
2. Menu options are packaged for each type of user
    a. Participant (personal) examples:
        i. Finding new course session
        ii. Reviewing current or past registrations
        iii. List of completed course
        iv. Evaluation and Assessments
        v. Course attachments
    b. Instructor / Facilitator (includes personal views) examples:
        i. All courses taught or facilitated
            1. Rosters
            2. Sign-in sheets
            3. Exports to external files (i.e. PDF, spreadsheet)
            4. Statistics examples:
                a. Assessments
                b. Evaluations
                c. Completion Rates
            5. Participant management examples:
                a. Grades
                b. Add walk-ins
                c. On-line attendance
            6. Attachment management
            7. Reports
    c. Proposer (includes personal views) examples:
        i. Component creation (separate rights)
        ii. Course Template and Course Session creation (separate rights)
    d. Managers have different rights and therefore different menus or views. (includes personal views) examples:

i. Super Users (all rights, all menus, and all views)
    1. Full access and full override ability.
    2. The super user has full control of all database tables, approval statuses, participant registrations, issuing of all access rights.
    3. Everything except changing the program code can be accomplished by the super user.
ii. Course approvers have approval screens
iii. All participant and course records
iv. Reports
v. Exports to other files

Authorizations (Access levels)

1. Access rights can be individually assigned to each element of the menuing system. Examples:
    a. Course approvals
    b. Participant records
    c. Database changes
    d. Rights to issue rights
2. Super Users (all rights)
3. Managers
    a. Various levels
4. Approvers (Review and/or Approval)
    a. Components
    b. Course Templates
    c. Course Sessions
5. Proposers
    a. Components
    b. Course Templates/Sessions
6. Instructors / Facilitators
7. Site Administrators examples:
    a. School-site participant reports
    b. Batch enrollment for all participants at that location to a session proposed by someone at that location

<u>Participant's Views</u>

1. Enrolled Course Sessions
    a. All attachments

b. Enrollment status
c. Ability to cancel session before start date

Notification System

1. Notifications are usually e-mails from a triggered event. Most event changes and actions will trigger a notification.
    a. Approval changes trigger an e-mail examples:
        i. Course is approved – the proposer receives an e-mail
        ii. A grade is issued – the participant receives an e-mail
        iii. Three days before a course session begins – all parties to the course session receive an e-mail (i.e. instructor and participants)
        iv. Course session location change – all parties to the course session receive an e-mail (i.e. instructor and participants)
        v. When a course session is cancelled - all parties to the course session receive an e-mail (i.e. instructor and participants)
2. All notifications are cc'd to the professional development department (or other designated e-mail address(es)
3. Password resets
    a. The information is sent to the person requesting the reset to the e-mail on file
4. All notification include a hyperlink that takes the recipient directly to the page that is the subject of the notification (after login) examples:
    a. Notification of a course session about to start – the hyperlink takes the recipient to the course session page in the participant's view of current registrations
    b. Notification of a denial of a course session will take the recipient to the course session in the course creation view

Registrations

1. Participants can register for course sessions that are not restricted to them
    a. Role restricted (administration, instructional, non-instructional)
    b. Location restricted (must work at specific location(s))
    c. Status designation restricted
        i. Fields can added to the participant database to indicate special coding examples:
            1. Clinical Educator
            2. National Board Certified
            3. Co-Teacher

4. Principal Preparation

2. Instructors / Facilitators can add walk-in participants (participants who failed to pre-register) up to seven days after the start date.
3. Site Administrators can batch enroll participants working at the same location number into a course session proposed by someone working at that location
4. Single registration and batch registration ability for participants (other than the participant themselves) is an issued right.

<u>Grades and Status Changes</u>

1. Instructors / Facilitators issue participant changes to the participant records
    a. Before the session begins:
        i. Changes to registration status (registered, cancelled, restricted enrolling pending)
            1. Any of the above to any other of the above
        ii. After the session end date, issue grades
            1. Satisfactory, Unsatisfactory, No Show, Cancelled, Pending Completion
2. Approvers
    a. Participant records
        i. Award, Deny, Cancel
    b. Components, Course Templates, and Course Sessions
        i. Approve, Deny, Cancel, Delete

Database Tables

1. Participant Database Fields
    a. Employee Number
    b. Lastname
    c. Firstname
    d. Middlename
    e. Location
    f. Role
    g. Job_desc
    h. Emp_email
2. Components (see Components)
3. Course Templates (see Course Templates)
4. Course Sessions (see Course Sessions)
5. Participant Records

    a. Employee Number
    b. Course Session ID
    c. Status
        i. Registered, Pending Approval, Restricted Enrollment Pending, Pending Completion, Award, Denied, Cancelled, Unsatisfactory, No Show, Satisfactory)
    d. Hyperlink address to the participant record for this course session
6. Log entries (one for each – Component, Course Template, Course Session)
    a. ID number
    b. Log entries (new entries can be appended to this field)
7. Course Session Status Changes
    a. Course session ID
    b. Status change
    c. Status changed by
    d. Status changed date
8. Evaluation Data Items (Questions)
    a. Course Session ID
    b. Participant Employee Number
    c. Evaluation Question ID
    d. Text
9. Evaluation Data Responses
    a. Course Session ID
    b. Participant Employee Number
    c. Evaluation Question ID
    d. Text
10. Assessment Data Items (Questions)
    a. Course Session ID
    b. Participant Employee Number
    c. Assessment Question ID
    d. Text
11. Assessment Data Items Responses
    a. Course Session ID
    b. Participant Employee Number
    c. Assessment Question ID
    d. text

<u>Sign-in Sheets and On-line Attendance</u>

1. A physical sign-in sheet for each course session is a mandatory, auditable document which must be maintained as evidence of eligibility for credit. This document is electronically generated and physically printed for each course session and includes:
    a. Course Session ID
    b. Dates of Attendance
    c. Identification of Registered Participants (Employee Number ID, Name, Work Location)
    d. Places for manual entry of submission of independent work and final grade.
    e. Place for the instructor to signature verify attendance
2. Completed sign-in sheets are faxed or imaged and e-mailed to the professional development office. The imaged files are placed in a server directory. The menuing system, on a schedule, scans the directory and catalogs the entries. The course session table field for sign-in sheets is marked (binary) if the sign-in sheets for that course session were found or not found. This designation is used for purposes of:
    a. Notifying all participants and the instructor that the sign-in sheets have not yet arrived after the posted end date of the course session at specific intervals (30, 45, and 60 days). On the 60th day, the system automatically denies all credit to the participants for his course session.
    b. If the sign-in sheets are present and the end date has passed and a grade of “Satisfactory” was given by the instructor, the participant’s records are available to the credit awarders to complete the awarding process. (Confirming that the participant was in attendance through a visual inspection of the sign-in sheet.)
    c. Notification to the instructor/facilitator at intervals after the posted end date of the course session that the sign-in sheets are due (usually 7 days after the end date).
3. The Streamlined On-line Attendance Option, Grading and Credit Award
    a. All of the requirements of the physical attendance sheets are needed with this option except:
        i. Grade and completion of independent word designation does not need to be manually recorded on the sign-in sheets; the sign-in sheets may be submitted immediately following the last meeting date of the course session.
    b. An on-line attendance roster is an option to the instructor/facilitator to take attendance by meeting date(s) for a particular course session.
        i. Attendance Status

1. P - Present
2. A - Absent
3. M - Make-up

ii. Independent Work Status

1. S – Complete or Not required
2. I – incomplete, not submitted, or unsatisfactory

c. If the Attendance Status is P or M for all meeting dates and Independent Work Status is S, the grade of "Satisfactory" is issued automatically for the instructor and credit is conditionally awarded. This triggers the notification system for the participant that an evaluation is available for this course session.

d. If any Attendance Status is A or the Independent Work Status is I then the grade of "Unsatisfactory" is issued automatically for the instructor and credit is not awarded. This triggers the notification system for the participant to submit an evaluation is available for this course session.

i. If the sign-in sheet field of the course session table indicates that the sign-in sheets are on file, credit will automatically awarded to the participants as per above. The sign-in sheets will only be used for internal audit purposes.

<u>Evaluations</u>

1. There is an evaluation creation tool to create customized evaluations for end of course session use. The tool will have templates for various forms of evaluations and rubrics to ensure quality evaluation.
2. The created evaluations can be designated to certain course sessions or made available for general use which can be assigned to other course sessions.

<u>Pre and Post Assessments</u>

1. There is an assessment creation tool to create customized assessments for the beginning and end of course session use (pre/post). The tool will have templates for various forms of assessments and rubrics to ensure quality assessments.
2. The created assessments can be designated to certain course sessions or made available for general use which can be assigned to other course sessions.

<u>Uploading Assignments and Materials</u>

1. Participants can upload external files on-line in order to send in required follow-up activities.

Screen Layouts and Functionality

1. The interface should be intuitive and easy to use.
2. All functionality and available features for each user (based on issued rights) are conveniently available to the user (i.e. tabs, drop downs, frames, pop-ups)
3. Full user documentation is provided in a help area.
    a. Includes demonstrations
4. Content/context sensitive help is available (i.e. right-click, roll-over, pop-up, function key)