

School Board Briefing/Proposed Action Report

Informational (no action required by Board) **Action Report** (Board will be required to take action)



DATE: September 16, 2015
FROM: Dr. Larry Nyland, Superintendent
LEAD STAFF: Carmen Rahm, Chief Information Officer, 206-252-0321, carahm@seattleschools.org
Charles Wright, Deputy Superintendent, 206-252-0168, cewright1@seattleschools.org

I. TITLE

BEX IV: Award Contract No. RFP09506, to Thornburg Computer Services, LLC for Computer Installation and Support service

For Introduction: October 21, 2015
For Action: November 4, 2015

II. WHY BOARD ACTION IS NECESSARY

Board action is required because the total amount of the purchase for this single project exceeds \$250,000. Per Policy No. 6220, any contract over \$250,000 must be brought to the Board for approval. The purchase of computer installation and support services will exceed \$250,000.

III. FISCAL IMPACT/REVENUE SOURCE

Fiscal impact to this action will be an estimate of \$300,000 over two years (\$150,000 in FY16 and \$150,000 in FY17). The additional Services will be purchased with BEX IV funding as part of the planned student device replacement and expansion. There is no General Fund impact.

The revenue source for this motion is BEX IV Capital Levy student computer replacement funds.

Expenditure: One-time Annual Other Source

IV. POLICY IMPLICATION

Per Policy No. 6220, Procurement, any contract over \$250,000 must be brought to the Board for approval. This is a two-year expenditure of \$150,000 per school year for classroom technology for learning.

V. RECOMMENDED MOTION

I move that the School Board authorize the Superintendent to execute Contract No. RFP09506, with Thornburg Computer Services, LLC in the amount of \$300,000 over the 2015/16 and 2016/17 fiscal years, plus Washington State Sales Tax, in the form of the draft contract attached to the Board Action Report, with any minor additions, deletions, and modifications deemed necessary by the Superintendent, and to take any necessary actions to implement the contracts.

VI. BOARD COMMITTEE RECOMMENDATION

This item was discussed at the Operations Committee meeting on October 15, 2015. The Committee reviewed the item and moved the item forward for consideration by the full Board.

VII. BACKGROUND INFORMATION

The District is taking a new, streamlined process over two years for selecting and acquiring new technology devices for the students. The District estimates 6,300 total devices and equipment may be purchased for the entire replacement project. In the first year, 40 schools shall select the devices they need for their classrooms, and then volume orders will be placed. The remaining schools shall select their devices the following year and a final list of devices shall be ordered.

The selected firm will carry out the following scope of work:

Deliverable Items	Vendor Responsibility – In Scope	District Responsibility - Out of Scope
Order Carts and Equipment		X
Deliver Carts and Equipment to Vendor		X
Unbox all equipment and dispose of packing material	X	
Install Laptops in carts	X	
Install iPads in carts	X	
Create report indicating equipment inventory (per cart)	X	
Pallet Desktops for delivery to JSCEE warehouse	X	
Pallet loose Apple/Dell laptops for delivery to JSCEE warehouse	X	
Establish Schedule for Vendor site visits		X
Install iMac desktops on desk on-site at schools and start image process (remove old equipment to designated area)	X	
Install Dell desktops on desk on-site at schools and start image process (remove old equipment to designated area).	X	
Imaging of devices on site at schools	X	

The Request for Proposal (RFP) was publicly advertised on September 14, 2015 and September 21, 2015 in the Daily Journal of Commerce to select a vendor for computer installation and support services. A pre-proposal conference was held on September 22, 2015. The District expects to receive proposals on October 8, 2015.

VIII. STATEMENT OF ISSUE

The goal is to have the devices in the classrooms by March 2016 to help support Smarter Balanced Assessments (SBA) and general instruction. Without the additional value added services, the current staffing level in Department of Technology Services (DoTS) would be unable to image and install the three thousand devices in a timely manner.

IX. ALTERNATIVES

- 1) Status Quo (Do Nothing) – Computers will be installed with current staff throughout the year. This is not recommended because it is not an efficient use of staff time and would impact the technical support received at the schools. The value added services would allow staff to continue supporting schools and ensure the equipment will be in classrooms by February/March of 2016.

X. RESEARCH AND DATA SOURCES / BENCHMARKS

- DoTS has proven this concept of value added services with the success of the SBA project. Additional Services was key in meeting the deadline of having computers in the schools to support SBA and general instruction.

XI. TIMELINE FOR IMPLEMENTATION / COMMUNITY ENGAGEMENT

SCHEDULE	
Date	Selection Process
September 14, 2015	Advertisement for Request for Proposal published. (First Notice)
October 8, 2015	Request for proposal due at 10:00 a.m.
Approx. October 16, 2015	Vendor Selection (anticipated)
January/February 2016	Work Begins (anticipated)
March 2017	Work Completed (anticipated)

XII. ATTACHMENTS

- RFP09506 Document
- Contract No. RFP09506 (Draft)
- Project Status Report

Seattle Public Schools
Contracting Services
2445 Third Avenue South
Seattle, WA 98134
Telephone: (206) 252-0566
Fax: (206) 743-3018
ContractingServices@seattleschools.org

Request For Proposal No. RFP09506

Computer Installation and Support Services

for

Seattle Public Schools' Department of Technology Services

Submittal Deadline:

Date: October 8, 2015

Time: 10:00 a.m.

Instructions

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REQUEST FOR PROPOSAL NO. RFP09506

PROPOSAL CERTIFICATION FORM

TO: Diane Navarro, Contracting Services Manager

The undersigned provider hereby certifies as follows:

- 1. That he/she has read the Seattle School District's Request for Proposal No. RFP09506 and the following Addenda and to the best of his/her knowledge has complied with the mandatory requirements stated herein:

Addendum Number	Issue Date
_____	_____
_____	_____
_____	_____

- 2. That he/she has had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked, they have been answered by the District.
- 3. That the proposer's response is valid for 90 days.

Dated at _____, this _____ of _____ 2015.

_____ (Signature)	_____ (Title)
_____ (Print Name)	_____ (Email Address)
_____ (Company Name)	_____ (Telephone Number)
_____ (Address)	_____ (Fax Number)
_____ (City)	_____ (UBI Number)
_____ (State)	
_____ (Zip)	

I. Introduction

Seattle Public Schools (referred to as “District” or “SPS”), Department of Technology Services (DoTS) is requesting proposals from qualified firms to provide computer installation and support services for the District’s student devices.

The successful firm shall have proven experience in providing computer device delivery, installation and support services to large organizations with multiple sites and a high volume of devices.

This Request for Proposal describes the selection process and the documentation required for submitting proposals for this project. Any firm failing to submit their proposal in accordance with the procedures set forth in the Request for Proposal may be considered non-responsive.

The selection of the firms for these services will proceed in the following manner:

- Proposals shall be received by Seattle Public Schools no later than **October 8, 2015 at 10:00 a.m.**
- An evaluation by the Selection Committee will follow, and a short-list of qualified firms may be determined.
- In order to select the best proposal, interviews may be conducted with the short-listed firms in accordance with a schedule to be determined by the Selection Committee.
- The District reserves the right to seek clarifications about the proposals.
- The District may award a contract based solely on the written proposals. However, the District may elect to engage in negotiations with a selected short list of Vendors, in order to improve the proposals and obtain the best contract for the District.
- The District reserves the right to request post-proposal modifications, including best and final offers and considerations.
- The final selection will be based upon the criteria set forth below. The District reserves the right to negotiate with the successful firm on pricing and scheduling.

Please note that the District will select the successful firm based on the best interests of the District, all factors considered. The District reserves the right to reject any or all proposals, waive minor irregularities, and make the award in its best interest.

Interested firms are encouraged to attend a pre-proposal conference at which the particulars of the project, schedule, and the elements of the contract will be discussed.

PRE-PROPOSAL CONFERENCE

Date: September 22, 2015
Time: 10:00 a.m.
Where: John Stanford Center
Address: 2445 Third Avenue South
 Seattle, Washington 98134

All information shall be submitted at the dates and dates indicated herein to:

<p><u>U.S. Mail:</u> Diane Navarro Contracting Services Manager Contracting Services Seattle Public Schools MS 22-337 PO Box 34165 Seattle, WA 98124-1165</p> <p>Telephone No.: (206) 252-0566 Fax No.: (206) 743-3018 Email: contractingservices@seattleschools.org</p>	<p><u>Federal Express:</u> <u>United Parcel:</u> <u>In-person delivery:</u></p>	<p>Diane Navarro Contracting Services Manager Contracting Services Seattle Public Schools MS 22-337 2445 Third Avenue South Seattle, WA 98134</p>
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Proposals must be submitted in a sealed package or box with the Request for Proposal Number RFP09506, deadline date and time included on the bottom left-hand corner of the response, along with the firm's name and address.

LAST DAY FOR QUESTIONS: September 24, 2015 at 2:00 p.m.

All questions must be submitted in writing by fax, email or U.S. Mail and addressed to the above. The District will consider no telephone inquiries regarding the Request for Proposal, and will consider no in-person inquiries except at the pre-proposal conference or at an interview for those firms making the short-list.

In the event that a firm attempts to contact any official, employee, or District representative in any manner contrary to the above requirements, said firm may be disqualified for further consideration.

This prohibition does not apply to:

- Telephone calls to the District to request copies of this proposal, to confirm attendance, or request directions relative to the pre-proposal conference or an interview notification received from the District.
- Delivery of written questions about the proposal.
- Delivery of the firm's proposal.
- Discussion at the interview.

II. Background

Seattle Public Schools is the largest K-12 school system in Washington State, serving nearly 52,000 students in 97 schools. In February 2013, voters approved the Building Excellence IV Capital Levy

(BEX IV) Campaign to fund major renovations, additions, new construction and improvements to various schools throughout the District. As part of the BEX IV levy, \$6.5 million was allocated for the replacement of student devices for classroom technology throughout the District.

The District's goals for this project include:

1. Remove and replace the oldest Student Devices (Beyond Support) in all schools.
2. Expedite additional equipment to schools to meet Smarter Balanced Assessment (SBAC) technology standards.
3. Maintain and possibly reduce student/computer ratio across SPS.
4. Reduce total cost of ownership.

III. Project Information

The District is taking a new, streamlined process over two years for selecting and acquiring new technology devices for the students. The District estimates 6,300 total devices and equipment may be purchased for the entire replacement project. In the first year, 49 schools shall select the devices they need for their classrooms, and then volume orders will be placed. The remaining schools shall select their devices the following year and a final list of devices shall be ordered.

The selected firm will carry out the following scope of work:

Deliverable Items	Vendor Responsibility – In Scope	District Responsibility - Out of Scope
Order Carts and Equipment		X
Deliver Carts and Equipment to Vendor		X
Unbox all equipment and dispose of packing material	X	
Install Laptops in carts	X	
Install iPads in carts	X	
Create report indicating equipment inventory (per cart)	X	
Pallet Desktops for delivery to JSCEE warehouse	X	
Pallet loose Apple/Dell laptops for delivery to JSCEE warehouse	X	
Establish Schedule for Vendor site visits		X
Install iMac desktops on desk on-site at schools and start image process (remove old equipment to designated area)	X	
Install Dell desktops on desk on-site at schools and start image process (remove old equipment to designated area).	X	
Imaging of devices on site at schools	X	

While devices are in possession of the Vendor, the Vendor shall be responsible for the devices.

IV. Selection Process

A. Schedule

SCHEDULE	
Date	Selection Process
September 14, 2015	Advertisement for Request for Proposal published. (First Notice)
September 21, 2015	Advertisement for Request for Proposal published. (Second Notice)
September 22, 2015	Pre-proposal Conference at 10:00 a.m.
September 24, 2015	Last day for questions from proposers at 2:00 p.m.
October 8, 2015	Request for proposal due at 10:00 a.m.
Approx. October 8-14, 2015	Initial Screening, with a short list of vendors selected as finalist (anticipated)
Approx. October 16, 2015	Vendor Selection (anticipated)
January/February 2016	Work Begins (anticipated)

B. Method of Selection

1. An initial screening of the proposals will be conducted based on the criteria set forth below. Proposals that do not meet the criteria will not be considered further.
2. The District reserves the right to select a single vendor for award of a contract based solely on the written proposals, and not to enter into any further discussions or negotiations.
3. The District reserves the option to meet with two or more Vendors and conduct negotiations based on the proposals in order to select the best proposal, all factors considered. As part of such negotiations, the District may require key personnel to be assigned to the contract to be present, and to discuss the firm's approach to managing the project based on their understanding of the project.

The District will select the successful firm based on the best interests of the District, all factors considered.

The following selection criteria will be the basis for firm selection:

QUALIFICATIONS – 80 points	
a) Proven experience in working with similar or larger organizations, preferably K-12 education, in computer installation and support	20 points
b) References	10 points
c) Local Support and Approach of Services	40 points
d) Project Schedule and Availability	10 points
PRICE OF SERVICES – 20 points	

C. Notifications

The District will provide timely notifications to firms responding to this Request for Proposal.

D. Seattle Schools Rights to Reject

The District reserves the right to reject any and all proposals and re-advertise the project at any time prior to final approval of the contract. All costs incurred in the preparation of the Request for Proposal process shall be borne by the proposing firm. Proposals submitted in response to this Request for Proposal shall become the property of the District and be considered public documents under applicable Washington State laws.

E. Procedures Requirements

Any firm failing to submit information in accordance with the procedures set forth herein may be considered non-responsive.

V. Submittal Requirements

A. The submittal requirements shall be as follows:

- The proposing firm, joint venture or other form of association (“firm”) shall submit three (3) hard copies and one (1) electronic copy (via CD or USB flash) of their proposal for the project. Each hard copy shall be provided in a white 3-ring, loose leaf binder with the firm name and the Request for Proposal name and number on both the cover and spine.
 - The Proposal document shall be limited to a maximum of thirty (20) pages (8 ½” x 11”), single sided, not smaller than 12 point type.
 - The cover letter, proposal certification form, table of contents, and tabs do not count toward the page limits.
 - Project cut sheets, including photos, are included in the page limits. Submittals exceeding the page limits may be considered non-responsive.

Please Note: In preparing the firm’s Proposal, the proposing firm shall clearly identify the designated person of record responsible for the referenced project. If proposed served as a sub-consultant for a referenced project, the proposing firm shall clearly identify its role. If the proposing firm is representing an individual’s experience while employed at another firm, the firm of record for the project and the individual’s role shall be clearly identified.

B. Content of Proposal

1. Signed Proposal Certification Form (page 3 of this RFP - does not count towards the page limit.)

2. Table of Contents (maximum 1 page).
3. Separate section with a tab: Executive Summary.
 - Provide a summary highlighting the firm's qualifications and expertise to provide the services requested in the Request for Proposal.
4. Separate section with a tab: Company Profile.
 - Identification of firm (or firms, if a joint venture or association) including address, telephone number, and date firm(s) were established.
 - Areas of specialization of the firm(s).
 - Provide total size and breakdown of firm personnel by category.
5. Separate section with a tab: Team Organization.
 - Explain your proposed team organization, roles and responsibilities, and personnel qualifications/resumes.
 - Organization: Provide an organization chart for the team indicating principal, project manager, other sub-consultants, etc. Give a brief description of the roles of the personnel on the team listing the firm by which they are employed.
6. Separate section with a tab: Experience.
 - Please describe the experience that makes your firm/team best qualified to carry out this work. If necessary, please include resumes of those who will work on this project. In your response, address experience or skills that include meeting facilitation, building collaboration, and project management. Include any additional information that you feel would make your firm/team the best candidate for completing this work.
7. Separate section with a sub tab: References.
 - Provide a minimum of three references that can speak to your experience and skills needed to successfully complete this project. If your proposal includes team members that are not part of your firm, please include three references for each member also. Include contact name, title, organization, contact telephone and email address.
8. Separate section with a tab: Approach.
 - Briefly describe your approach to this project and how your team would meet the project deadlines.
 - Is there anything that you can identify that may delay completion of this Project by the proposed end date stated on the scope of work?

- The District has many schools all over the City of Seattle that will need to have devices set up on site. Describe the location of your office(s) in relation to the schools and how you intend to address any issues that may arise while out at the schools. Include your process on turnaround and response time.

9. Separate section with a tab: Availability and Capacity.

- Briefly discuss the availability of all key personnel for the scheduled time frame of the proposed project, and identify their proposed location during provision of the requested services. Additionally, discuss the capacity of the proposed team, as a whole, to accomplish the work.
- Propose a timeline with potential dates assuming a start date of January/February 2016.

10. Separate section with a tab: Pricing.

Please provide unit pricing for the following:

- Unbox all equipment and dispose of packing material.
- Install Laptops in carts
- Install iPads in carts
- Pallet unboxed Desktops for delivery to JSCEE warehouse.
- Pallet loose Apple/Dell laptops for delivery to JSCEE warehouse.
- Install iMac desktops on desk at schools and start image process (remove old equipment to designated area).
- Install Dell desktops on desk at schools and start image process (remove old equipment to designated area)
- Image Laptops onsite at the schools.

11. Separate section with a tab: Terms and Conditions.

Include any comments or proposed changes to the District's standard form of contract.

VI. Contract and Contracting Provisions

A. Standard Form of Contract

The District's standard form of contract is included as Attachment 1. The proposal should include any comments or requested changes. **Please note: the District reserves the right to reject any firm that is not willing to accept the District's terms and conditions as noted in the standard form of contract.**

B. Contract Period

The contract term shall be in effect for two years from the effective date. Subject to satisfactory annual evaluation of the Vendor by the District, this contract may, with mutual agreement of both parties, be extended up to two (2) additional, one-year terms

under the same terms and conditions. The District reserves the right to terminate the contract with thirty (30) days' written notice.

C. Protest Procedures

1. Any actual or prospective Vendor who is aggrieved in connection with the solicitation or award of this contract may protest to the District in accordance with the procedures set forth herein. Protests based on the terms in this Request for Proposal, which are apparent prior to the date established for submitting the proposal must be received seven (7) days prior to the submittal deadline. Protests based on other events must be received within three (3) working days after the aggrieved person knows, or should have known, of the facts and circumstances upon which the protest is based; provided, however, that in no event shall a protest be considered if all proposals are rejected or if the protest is received after the award for this contract.
2. In order to be considered, a protest shall be in writing and shall include: the name and address of the aggrieved person; the contract title under which the protest is submitted; a detailed description of the specific grounds for protest and any supporting documentation; and the specific ruling or relief requested. The written protest shall be addressed and delivered to:

Kenneth Gotsch
Assistant Superintendent for Business and Finance
Seattle Public Schools
Mail Stop 33-300
PO Box 34165
Seattle, WA 98124-1165

or delivered to:

Kenneth Gotsch
Assistant Superintendent for Business and Finance
Mail Stop 33-300
Seattle Public Schools
2445 Third Avenue South
Seattle, WA 98134

And shall be labeled: "Protest"

3. Upon receipt of a written protest, the District shall promptly consider the protest. The District may give notice of the protest and its basis to other persons, including Vendors involved in or affected by the protest; such other persons may be given an opportunity to submit their views and relevant information. If the protest is not resolved by mutual agreement of the aggrieved person and the District, the District will promptly issue a decision in writing stating the reasons for the action taken. A copy of the decision

shall be mailed by certified mail, return receipt requested, or otherwise promptly furnished to the aggrieved person and any other interested parties. The District's decision may be appealed to the Superintendent by written notice together with all supportive evidence, received at the address set forth in paragraph 2, not more than two (2) working days after receipt of the decision. The Superintendent's decision shall be final and conclusive.

4. Strict compliance with the protest procedures set forth herein is essential in furtherance of the public interest. Any aggrieved party that fails to comply strictly with these protest procedures is deemed, by such failure, to have waived and relinquished forever any right or claim with respect to alleged irregularities in connection with the solicitation or award. No person or party may pursue any action in court challenging the solicitation or award of this contract without first exhausting the administrative procedures specified herein and receiving the District's final decision.
5. Any Vendor submitting a proposal shall be deemed to have accepted these procedures.

End of Request for Proposal

ATTACHMENTS:

Attachment 1: Device List

Attachment 2: Standard Form of Contract

**AGREEMENT
COMPUTER INSTALL AND SUPPORT SERVICES**

This Agreement, Contract No. RFP09506, is effective upon execution by both parties by and between Seattle School District No. 1, a Washington municipal corporation (District), and Thornburg Computer Services, LLC (Vendor). The District and Vendor agree as follows:

1. SCOPE OF WORK AND SCHEDULE

Vendor shall provide services as described in Exhibit A, Scope of Services. Vendor is authorized to proceed upon receipt of this signed Agreement. This contract shall be in effect from the effective date through December 31, 2017. With mutual agreement between the District and the vendor, the contract may be extended on an annual basis up to two (2) additional one-year terms under the same terms and conditions. Either party may terminate this Agreement at any time upon thirty (30) days written notice.

The District does not guarantee any specific amount of work as a result of this contract.

2. CONTRACT PRICE

District agrees to pay the Vendor the total amount issued on each purchase order based upon the Vendor unit prices shown in Exhibit H. Purchase Orders will be issued identifying project number, school location, equipment part, quantity and services required. The combined total amount for all purchase orders issued from this contract is not to exceed **THREE HUNDRED THOUSAND DOLLARS (\$300,000.00)**. This amount constitutes the "Maximum Authorized Compensation" as shown in Exhibit H, Pricing, for services to perform the work identified in the Request for Proposal No. RFP09506. The District is under no obligation to order any items off of this contract.

This amount shall constitute complete compensation for all costs and fees incurred, including any expenses for meals, travel, lodging, and Washington State sales tax, if applicable. Any increase above this amount will require agreement by the parties.

Compensation will be paid monthly to the extent that Vendor presents documented evidence of fees earned and expenses incurred during the period for which payment is requested, and in no case shall the total compensation exceed the Maximum Authorized Compensation. Vendor shall submit its invoices in the form and according to the schedule prescribed in the General Conditions, to the address listed in paragraph 3.

3. COMMUNICATION

The District's representative for this contract is Colleen Halvorson, IT Manager. All correspondence, requests, notices and other communications to the District, in relation to this Agreement, shall be in writing and shall be delivered to:

To the District: Colleen Halvorson
IT Manager
MS 21-350
Seattle School District No. 1
P. O. Box 34165
Seattle, WA 98124-1165

To the Vendor: Thornburg Computer Services, LLC
Timothy Fieldsend
Owner/CEO
PO Box 11455
Olympia, WA 98508

Either party may from time to time change such addresses by giving the other party notice of such change in accordance with the provisions in Paragraph 3. above.

4. VENDOR'S REPORTS

Vendor shall provide reports as requested by District and as specified in Exhibit A, Scope of Services.

5. **PERSONNEL**

Vendor shall assign the personnel listed in Exhibit C, Team Organization, for the performance of the Work and shall not (for so long as they remain in Vendor's employ) reassign or remove any of them without the prior written consent of District.

6. **THIS AGREEMENT INCLUDES THE FOLLOWING ATTACHMENTS:**

Exhibit	Topic
A	Scope of Services from RFP09506
B	Approach from Thornburg Computer Services, LLC in response to RFP09506, dated October 7, 2015.
C	Team Organization from Thornburg Computer Services, LLC in response to RFP09506 dated October 7, 2015.
D	Availability and Capacity from Thornburg Computer Services, LLC in response to RFP09506, dated October 7, 2015.
E	Experience from Thornburg Computer Services, LLC in response to RFP09506, dated October 7, 2015.
F	Addendum No. 1, dated September 30, 2015.
G	Services Contract General Conditions (Short Form)
H	Pricing from Vendor

THORNBURG COMPUTER SERVICES, LLC

SEATTLE SCHOOL DISTRICT NO. 1

Signature

Signature

(Vendor Representative)

Dr. Larry Nyland
Name

Title

Superintendent
Title

Date Signed

Date Signed

Company Name

Exhibit A

SCOPE OF WORK

The District estimates 6,300 total devices and equipment may be purchased for the entire replacement project. In the first year, 49 schools shall select the devices they need for their classrooms, and then volume orders will be placed. The remaining schools shall select their devices the following year and a final list of devices shall be ordered.

The District may order additional services at the unit pricing listed in Exhibit H for additional separate projects, if needed.

Deliverable Items	Vendor Responsibility – In Scope	District Responsibility - Out of Scope
Order Carts and Equipment		X
Deliver Carts and Equipment to Vendor		X
Unbox all equipment and dispose of packing material	X	
Install Laptops in carts	X	
Install iPads in carts	X	
Create report indicating equipment inventory (per cart)	X	
Pallet Desktops for delivery to JSCEE warehouse	X	
Pallet loose Apple/Dell laptops for delivery to JSCEE warehouse	X	
Establish Schedule for Vendor site visits		X
Install iMac desktops on desk on-site at schools and start image process (remove old equipment to designated area)	X	
Install Dell desktops on desk on-site at schools and start image process (remove old equipment to designated area).	X	
Imaging of devices on site at schools	X	

Project: BEX IV Student Technology Levy Allocations
Date: 9/21/15
Prepared By: Robert Shore
Reporting Period: 9/14/15 through 9/18/15

Fundamentals

Vitals	Status	Description
Overall	Yellow	Develop comprehensive plan to determine school technology allocations, deliver equipment options and selections via the web, simplify choices that support school curriculums & online testing, and devise an allocation process agreed upon by executive management and C & I. School allocations are currently being determined through 2015 enrollment numbers and existing computer inventories.
Schedule	Green	Deployments will be dependent on the timely submission of school tech plans. Half the schools will be targeted for allotments in FY 15-16, the remainder for FY 16-17. However, priority will be given to under-performing sites.
Budget	Green	Budget is secured for FY 2015-2016 and FY 2016-2017
Scope	Green	Approximately fifty schools are scheduled for student technology upgrades during fiscal year 2015-2016. The remaining fifty will be addressed in FY 2016-2017

[Schedule, Budget, Scope status is **Green** (project moving as planned), **Yellow** (project at risk) or **Red** (serious issues impacting project progress or project on hold). If not Green, provide explanation for variance.]

Required Management Actions <i>(Issues/decisions requiring action from CIO or Deputy Superintendent)</i>	Action required by:
<ul style="list-style-type: none"> Allow half of Levy budget funds to be spent on combined equipment purchases for cumulative fiscal year 2015-2016, pre-approved by School Board 	School Board
<ul style="list-style-type: none"> Allow second half of Levy funds to be spent on combined purchases for FY 2016-2017 	School Board
<ul style="list-style-type: none"> Competitive bid for equipment, RFP for services 	Operations Superintendent & Procurement
<ul style="list-style-type: none"> Board Action for expenditures exceeding \$250,000 each for levy equipment and services 	School Board

Weekly Status Summary**Key Decisions**

- Resolve school computer inventories for FY 2015-2016 deployments
- Allocation determinations. Devise formula to calculate distributions that are equitable, support curricular programs, and promote on-line testing
- Determine methods to assist decision-making processes for schools' technology selections
- Who will approve schools' technology decisions – Principals, Ed Directors, or Curriculum & Instruction
- Result from 8/27/15 meeting: Procurement will require Competitive Bid for equipment and RFP for services (unboxing, imaging, palletizing, & ship to warehouse)
- Logistics Director assures that asset tagging will be performed by Local 117 in the warehouse in timely manner

Completed

- Received raw computer inventory numbers
- Extracted current enrollment numbers from PowerSchool for school year 2015-2016
- PowerPoint ready for Ops Cabinet presentation 8/5/15
- Create levy website with equipment choice options
- Provided Purchasing with estimated costs & quantities for projectors and doc cams – 8 schools
- Provided Purchasing Department with estimated equipment quantities and costs for equipment RFP generation
- Allocations now determined for all schools and posted to Levy website
- Finance Office determined levy funds to be distributed over two years, not one

Pending

- Customized inventory spreadsheet & Tech Plan template for schools
- Allocation numbers approved by schools
- Enhanced configuration for Dell Latitude 3340 on choice list

Plans for Next Reporting Period:

- Update all linked documents on Levy website and have ready for reference

Project Performance:**Estimated vs. Actual Milestone Completion**

Milestone/Deliverable	Estimated Finish Date	Actual Finish Date	Status Notes
1. \$3.25 Million budget for FY 2015-16	August 2016	August 31, 2016	DoTS Budget Analyst
2. \$3.25 Million for FY 2016-2017	August 2017	August 31, 2017	DoTS Budget Analyst
3. Student Enrollment Numbers	May 2015	August 2015	PowerSchool provided accurate enrollment numbers for school year starting September 2015
4. School Inventories	April 2015	April 2015	Data from Fixed Assets and NetOps records

Milestone/Deliverable	Estimated Finish Date	Actual Finish Date	Status Notes
5. Allocation Formula	August 2015	September 2015	Student-to-computer ratio is improved to 2.7:1 from 3.5:1. Master spreadsheet is completed to provide true computer inventory numbers and accurate allocations
6. Informational Levy Website	June 2015	September 2015	Re-design of original website using new tools in SharpSchool. Update with current information. Numerous linked documents are revised
7. School allocation agreements	November 2015		Vetted by each school
8. Create Customized Calculator Spreadsheet	September 2015		Pending school allocations are approved
9. School equipment decisions	November 2015		
10. Bid for equipment	November/ December 2015		
11. Procurement & Distribution	January/ February 2016		
12. Provide RFP data to Procurement & Finance	September 4, 2015		Result of Procurement, Logistics, DoTS, & Finance meeting – 8/27/15

Key Project Determinations:

Decision	Decision Maker(s)	Date of Decision
Standard equipment measures	DoTS	April 2015
Allocation formula	Robert, Colleen, Eric C, Matt Johnson	August 2015
Informational Levy website (Student Tech Replacement) update	Robert, Colleen	August 2015
Levy purchases cannot be made through WSCA (Washington State Contracting Authority) vendors. Competitive bid process will be followed for equipment acquisitions and RFP for service providers	Pegi McEvoy, Ken Gotsch, Kathleen Katterhagen, Carmen Rahm	August 2015
Board Action Reports (BAR) required for levy expenditures above \$250,000. The two separate costs for equipment and services will each exceed that amount over the two-year project. Colleen Halvorson authored both documents	School Board	November 2015

New Identified Project Issues/Risks:

Date Issue/Risk Identified	Issue/Risk Description	Potential Impact (H, M, L)/ Probability %	Mitigation Steps/Consequences
4/1/15	Extended school response times will delay equipment ordering schedule	H/75%	Ed Directors could provide decision impetus

Date Issue/Risk Identified	Issue/Risk Description	Potential Impact (H, M, L)/ Probability %	Mitigation Steps/Consequences
4/1/15	Warehouse asset tagging will delay equipment deliveries	H/75%	Warehouse expeditors place low priority on processing computers
4/1/15	Warehouse negotiation & agreement for third-party equipment processing	H/75%	Cost to pay for Local 117's lost work will erode levy funds
4/1/15	Holidays & Vacations	M/100%	Vendors and Warehouse personnel not always available or absent at critical deployment times
4/1/15	Testing Schedules	M/100%	Schools don't want interruptions during testing which delays deployments
7/14/15	Levy funds are not sufficient to replace all out-of-warranty equipment.	M/100%	Replacement of aged computers is a primary goal but is often conceded to maintain adequate numbers for student access. Reliance on TSS and TechLine to support aging equipment is increased
7/24/15	Inconsistent iPad inventory data	M/50%	Requiring more time than anticipated to update data. Inventory numbers now resolved, 8/16/15
8/27/15	Extended time required for RFP process may delay acquisitions and deployments.	H/80%	RFP bidders have ability to contest outcomes which would further delay bid award
9/18/15	Board might not approve either of the Action Reports for levy equipment and service	M/50%	The two portions of the project are dependent on the other. Both need approval for successful project implementation. Consequences are approaching each school for an individual tech order

Project Team Information:**Project Sponsor:** Carmen Rahm**Senior Leaders:** Colleen Halvorson, Eric Caldwell**Project Manager:** Robert Shore**Core Team Members:** Carmen Rahm, Eric Caldwell, Colleen Halvorson, Robert Shore