

Request for Information No. II
RFP No. 19/20-04 Help Desk System
October 16, 2019

Response to Proposers' Questions

2.1 Question: How large is the IT department Irvine Unified School District?

Answer: Irvine Unified School District has 65 employees in the IT department. All IT employees use the Help Desk. In addition to the IT department, the Theater Management department also uses the help desk system, with 3 help desk system users. Additional departments within IUSD have expressed an interest in using the help desk system as well. We expect an additional need for licenses for approximately 10 technicians over the next year, including IT growth, the addition of our security team, and a pilot program for student technicians.

Each Participating Associate Member will have different needs and have a uniquely sized IT department. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.2 Question: How many people work on the help desk at Irvine Unified School District?

Answer: Please see the answer to question 2.2.

2.3 Question: Does Irvine Unified School District intend to run the ITSM system on-premises or SaaS?

Answer: IUSD's preference is for a SaaS Help Desk Solution to ensure reliability during a local outage.

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2.4 Question: Does Irvine Unified School District have a target Go-Live date for the selected solution?

Answer: Irvine Unified School District anticipates a Go-Live date of January 15, 2020.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.5 Question: If applicable, what is driving this target date at Irvine Unified School District? (E.g. upcoming renewal of existing solution, budget cycle, etc.)

Answer: Irvine Unified School District has based its Go-Live date on the expiration date of its current solution.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.6 Question: How large is the IT department Fullerton School District?

Answer: Fullerton School District has 42 employees in the IT department.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.7 Question: How many people work on the help desk at Fullerton School District?

Answer: 41 tech staff would work at various levels while about 900 staff and 13000 students could ask for support.

Each Participating Associate Member will have different needs and have a uniquely sized IT department. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.8 Question: Does Fullerton School District intend to run the ITSM system on-premises or SaaS?

Answer: The Fullerton School District has no preference on where to run it's ITSM as long as data is exportable from either system.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.9 Question: Does Fullerton School District have a target Go-Live date for the selected solution?

Answer: The Fullerton School District has no hard target for Go-Live. Post holidays is preferred.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.10 Question: If applicable, what is driving this target date at Fullerton School District? (E.g. upcoming renewal of existing solution, budget cycle, etc.)

Answer: Fullerton SD's target is a modernized system with superior reporting.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.11 Question: The "One-Time Costs" requested in Appendix C will be dependent upon the final scope requested by the purchasing entity. Could Ed Tech JPA please define the scope that you would like to have for the cost proposal? E.g. hosted / on-prem, number of environments, # of departments (including Facilities or not), # of self-service portals, # of asset data sources, data migration requirements, etc.

Answer: Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs. Vendors should specify different options available in their Proposals. It is acceptable to propose implementation and/or training pricing with an hourly rate, daily rate, tiered rates (based on size, environment, etc.), or tiered based on packages (number of days, environment, number of staff assisting, etc). The response to the pricing form may include a menu of implementation options with associated pricing.

2.12 Question: Page 7, Section 1.12 Ed Tech JPA Administrative Fee – Can you clarify if this is a one-time fee or if this fee is recurring?

Answer: The JPA Administrative Fee is a recurring fee of 4% of the purchase/renewal. The intent of the Administrative Fee is to assist Ed Tech JPA in covering operating costs, including the cost to advertise the RFP, as well as staff time and legal costs associated with the development, administration, and negotiation of the RFP and resulting contracts. The Administrative Fee is not intended to create a profit to Ed Tech JPA or any of its members. Ed Tech JPA has assumed significant operating costs, and hopes that in future years, as we continue to grow and have abated the start-up costs, the Board will be able to lower the Administrative Fee.

2.13 Question: Page 61 - Administrative Fee Acknowledgment –

a. Is the vendor sending a payment directly to JPA for each contract executed with any given CA entity leveraging the JPA agreement in the amount of 4% of the total contract cost up front once the contract is executed?

Answer: Vendors should submit a Quarterly Report according to the reporting periods reflected in Section 1.14 of the RFP and 15 of the Master Agreement. Vendors should submit payment for the Administrative Fee for payments received during the reporting period when they submit their Quarterly Reports. For example, for all Purchase Agreements with JPA Members executed from July through

September, Vendor's would submit a summary of sales (template to be provided by the JPA) and payment by the end of October.

B. With a multi year agreement a vendor will typically execute a 3 or 5 year SaaS contract but collect customer payment on an annual basis. How is this payment structure defined by JPA for the vendor can we get more clarity on this?

Answer: Vendors will work directly with Participating Associate Members to determine the length of contracts and when payments are due. If a Vendor signs a multi-year contract with a Participating Associate Member, with annual payments, the Vendor should include the contract information in the Quarterly Report with a note that payments are annual. The Administrative Fee should be paid to Ed Tech JPA for the annual amount each year. It is not expected that Vendors will pay Administrative Fees for payments not yet received. If payments are deferred or delayed for any reason, Vendors would provide an explanation during the reporting period to the JPA.

C. Should the vendor be building in this 4% administrative fee to JPA with the licensing / training / services pricing for the contract that is provided to JPA? Alternatively NOT include in the contract pricing to JPA but plan for this 4% administrative fee when a contract is executed?

Answer: Yes. The Administrative Fee should be embedded in the pricing provided in Vendors' proposals. Pursuant to section 15 of the Master Agreement the Administrative Fee should not be included as an adjustment to Vendor Pricing and should not be invoiced or charged to Participating Associate Members.

2.14 Question: Page 60 - Minimum Price Guarantee Acknowledgment – Does the minimum pricing guarantee for all CA entities who are eligible to leverage and benefit from the JPA contract vehicle include the 4% administrative fee from a cost standpoint?

Answer: Yes. The Administrative Fee should be included in Vendor's pricing in all aspects of the RFP and resulting agreements.

2.15 Question: Related to the vendor questions that are submitted to JPA will all questions submitted and all answers to all those questions be available for all vendors to review? Alternatively will just the specific questions asked by any particular vendor to JPA be answered for that specific vendor but not shared with the entire pool of vendors? If possible we would request the opportunity to review all questions submitted to JPA from all vendors along with all responses to these questions.

Answer: All questions received during the RFI period and responses will be posted to <https://edtechjpa.iusd.org/procurement/open-procurements> on or before the scheduled date for Responses for Questions to be posted. In an effort to ensure that all Vendors are provided with the same information and the RFP process is fair and impartial all answers to questions will be included as part of the RFI process.

2.16 Question: Does the Ed Tech JPA allow redlines on all forms included on the Proposal Submission Checklist?

Answer: Ed Tech JPA is open to reviewing redlines on forms, however, some forms are standard, required forms and can not be altered. The Acknowledgment of Amendments to RFP, Vendor Representation and Certification, Noncollusion Declaration, Certification of Primary Participant Regarding Debarment, Suspension, and Other Responsibility Matters, Certification on Restrictions on Lobbying, Worker's Compensation Certificate, Drug-Free workplace, Tobacco Use Policy, Criminal Records Check Certification by Vendor, and W-9 were not developed by Ed Tech JPA and must be completed as provided. If a Vendor wishes to submit redlines related to the Master Agreement & Purchase Agreement Confirmation, Insurance Requirements Acknowledgment, Minimum Price Guarantee Acknowledgment, Administrative Fee Acknowledgment, Rules Acknowledgment, and CSDPA they may do so. Any changes to the forms must be approved by Ed Tech JPA (and changes to the CSDPA must be approved by CETPA and the California Student Privacy Alliance). Awards will be made contingent upon successful contract negotiations.

2.17 Question: Can you provide an editable document to make for easier data entry and submission?

Answer: A Response Template in word has been provided for all vendors at https://drive.google.com/drive/u/0/folders/1eG873Mc7vObRI-TuX_vJNfyDUf6Ce90u . Please visit our website for all documents related to this RFP.

2.18 Question: Would you like to have RFID as an option for conducting inventory via the asset management solution?

Answer: Neither Fullerton nor IUSD intend to incorporate RFID for conducting inventory at this time. Other JPA Members may be interested in this feature. We recommend that, if available and offered at an additional cost over the base product(s), you list this as an optional service on the pricing form.

Each Participating Associate Member will have different needs and desires related to RFID. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs.

2.19 Question: Would you like to have inventory reconciliation services as an optional service to be included in the response/offering?

Answer: If a Vendor is offering inventory reconciliation services as an optional, add-on service it should include these services in the "Optional Services/Solutions and Costs" form of Appendix C. If inventory reconciliation services are offered as part of a Vendor's core system they should be included in the "Annual Recurring Costs" forms in Appendix C. It is crucial that vendors clearly outline what features

are included in the base/annual costs and what features are offered at an additional cost. Vendor should be sure to highlight this both in the criteria section(s) and the pricing section.

Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs. Clearly showing what features are included in base costs and what features are offered as an additional cost helps Ed Tech JPA members determine what solution best fits their needs.

2.20 Question: What type of integration would you like between the help desk and asset management system?

Answer: Vendors should describe what inventory management capabilities are available in Section/Specifications 3.6.5 and 3.6.5.1 of the RFP. Ideally a Solution would track the age and specs of inventory items to allow Participating Associate Members to easily reference this information when reviewing tickets. Ed Tech JPA Members have asked for integrations that would support reporting on frequency of issues by device or device make/model. Additionally, some JPA members have requested the ability to customize the Help Desk form or workflow (e.g., automated messaging for a device beyond end-of-life) based on inventory attributes.

Questions 3.6.5 and 3.6.5.1 are not essential requirements. Each Participating Associate Member will have different needs. Ed Tech JPA is a consortium style procurement vehicle and seeks to obtain proposals that allow its members to determine which solution will best meet their individual needs. Vendors are encouraged to respond to non-essential criteria so member districts can make a determination regarding which solution is the best fit for their needs.

2.21 Question: With the minimum price guarantee acknowledgment listed, can you outline any exceptions to that clause?

Answer: The Minimum Price Guarantee does not apply to contracts and partnerships that were in effect prior to the Master Agreement between Ed Tech JPA and Vendors. Ed Tech JPA also recognizes that some exceptions may be required for exceptionally large clients (such as LAUSD). If a Vendor feels a lower price should be offered to a certain customer Ed Tech JPA would be open to discussing an exception to the Minimum Price Guarantee with that Vendor.

The intent of the Minimum Price Guarantee is to create a partnership with vendors. The goal to streamline procurement results in vendors responding to only one RFP, and negotiating one Master agreement with competitive pricing and terms, that is compliant with privacy terms. Ed Tech JPA seeks to mutually benefit both members and vendors through consortium style procurement.