



**Portland Public Schools
School District 1J
Multnomah County, Oregon**

**Request for Proposals
Information Technology Contingent Staffing
RFP No. 2010-1304**

Proposals Due:	Not Later than 2:00:00 PM PST, July 21st 2011 Late proposals will not be accepted or considered.
Submit Proposals to:	Physical Address: Portland Public Schools Bid Desk Procurement Services 501 N. Dixon Street, 2 nd Floor, Area 264 Portland, Oregon 97227 US Mail Address: Portland Public Schools Procurement Services Bid Desk PO Box 3107 Portland, Oregon 97208-3107
Direct Questions to:	Procurement Contact: Ryan Allen Email: rallen3@pps.k12.or.us Deadline for Questions: July 11th 2011
Electronic Responses:	Electronic responses shall not be accepted or considered.

Pre-Proposal Conference:

One pre-proposal conference will be held on June 23rd, 2011, 9:00 AM in the Wy-East L1 Conference Room, located at 501 N. Dixon Street, Portland, Oregon 97227. **Attendance is optional.** Portland Public Schools conducts such meetings in order to clarify information provided in the RFP and to provide interested Proposers an opportunity to ask questions about the RFP. Statements made by the District's representatives at the conference are not binding on the District unless confirmed by written addendum.

RFP Availability:

This RFP is available electronically through the Oregon Procurement Information Network (ORPIN) website at <http://orpin.oregon.gov>. Interested parties must be registered with ORPIN to obtain and download documents. Registration is at no cost. Future notices regarding this solicitation, including solicitation addenda, will be posted to ORPIN. See the State Procurement ORPIN at <http://www.oregon.gov/DAS/SSD/SPO/eprocurement.shtml> for additional information regarding use of the ORPIN system.

Proposal Opening:

A 2:15 PM public Proposal Opening will be held at Bid Desk located at the Blanchard Educational Service Center, 501 N. Dixon Street, Portland Oregon, 97227 the same day proposals are due.

TABLE OF CONTENTS

RFP 2010-1304

Information Technology Contingent Staffing

1	<i>Introduction</i>	<i>4</i>
1.1	About Portland Public Schools.....	4
1.2	Timeline	4
1.3	RFP Questions, Clarifications and Changes.....	4
2	<i>Scope of Work.....</i>	<i>5</i>
2.1	Overview	5
2.2	District Technical Environment	6
2.3	Position Descriptions.....	9
2.4	Sample Position Descriptions (Segment II)	14
2.5	Key Personnel.....	16
2.6	Consultant Benefits.....	16
2.7	Contractor and Subcontractor Fingerprint-Based Criminal History Verification.....	17
2.8	Additional Terms and Conditions of the Contract	17
3	<i>Proposal Format, Content, and Submission.....</i>	<i>18</i>
3.1	Proposal Format	18
3.2	Proposal Content	18
3.3	Proposal Responses to Evaluation Criteria.....	19
3.4	Proposal Submission.....	23
4	<i>Proposal Evaluation and Award.....</i>	<i>25</i>
4.1	Clarification of Responses	25
4.2	Proposal Evaluation	25
4.3	Notification of Intent to Award	26
4.4	Negotiation	26
5	<i>Solicitation Terms and Conditions; Protest of Solicitation or Award.....</i>	<i>27</i>
5.1	Solicitation Document	27
5.2	Proposer Cost of Response Preparation	27
5.3	Submitted Materials are District Property	27
5.4	Proposal Validity	27
5.5	Solicitation Cancellation, Rejection of a Proposal or All Proposals.....	27
5.6	Disputes.....	27
5.7	Publicity	27
5.8	Preference for Recycled Materials.....	27
5.9	Performance within state of public printing, binding and stationary work.....	28
5.10	Confidentiality.....	28
5.11	Protests.....	28
6	<i>Contract Terms and Conditions</i>	<i>31</i>

6.1	Contract Award and Term	31
6.2	Portland Public Schools Contract.....	31
6.3	Insurance	31
6.4	Asbestos Abatement.....	31

Attachment A: Sample Agreement

Attachment B: Proposer Certifications and Representations

Attachment C-I: Proposer's Reference Sheet – Segment I

Attachment C-II: Consultant Pool / Reference Form – Segment II

Attachment D: Price Proposal Form

Attachment E: Supplemental Terms and Conditions

Attachment F: Sample Requirement Document

1 Introduction

Portland Public Schools ("District") seeks written proposals from qualified vendors able to provide professional staffing for the Information Technology (IT) department. The District may award multiple contracts as a result of this RFP. The District will determine the number of contracts to be awarded at time of contract award. The contract term will be three years with options to renew for two additional one-year terms.

1.1 About Portland Public Schools

Portland Public Schools, founded in 1851, is an urban school district in Portland, Oregon. With approximately 47,000 students in 85 schools, it is the largest school district in the Pacific Northwest.

PPS students participate in diverse programs and learning opportunities that are supported by teachers, families, community members, nonprofit organizations, local businesses and higher education institutions, including Portland State University, Portland Community College, Oregon Health and Science University, Oregon State University, and the University of Oregon.

1.2 Timeline

ACTIVITY	DATE
Issuance of Request for Proposal	June 10 th , 2011
Mandatory Pre-proposal Conference	June 23 rd , 2011 9:00 AM
Deadline for Questions or Clarifications	July 11 th , 2011
Proposals Due	July 21 st , 2011 2:00:00 PM
Notice of Intent to Award	August 31 st , 2011
Anticipated Contract Start	November 1 st , 2011

The District reserves the right to deviate from this schedule.

1.3 RFP Questions, Clarifications and Changes

Any Proposer requiring clarification of the information provided in this solicitation must submit specific questions or comments in writing to the Procurement Contact shown on page 1 of this document. Email is the preferred form of written communication. The deadline for submitting such questions is shown on page 1 of this document.

1.3.1 Addenda

If the District determines that additional information or interpretation is necessary, such information or interpretation will be supplied in addenda, posted on ORPIN.

Those who have registered their interest in the solicitation through ORPIN will be notified of addenda via email. Addenda shall have the same binding effect as though contained in this RFP. Procurement Services may issue all addenda not less than five (5) calendar days prior to the submission deadline.

Statements made by the District's representatives are not binding on the District unless confirmed by a written addendum.

2 Scope of Work

2.1 Overview

The intent of this Request for Proposals (RFP) is to develop a list of Contractors that can provide qualified Consultants to fulfill IT Assignments on an as-needed basis. The District will contact one or more Contractors from this list when assignments arise (see Attachment E). At that time, the District will provide the Contractor with detail on the project and its estimated duration, type of work to be performed, required skill sets, physical requirements, and other information relevant to the assignment (see Attachment F). Assignments will be made on a Consultant-by-Consultant basis.

The District operates a varied technical, physical, and organizational environment, requiring IT staff with a wide variety of technical and interpersonal skill sets. Types of Assignments for which the District may require placements include, but are not limited to: Project Manager, Application Administrator, Database Administrator, Programmer, Systems Analyst, Web Developer, Network Technician, Technical Support Specialist, Security Specialist, Business Process Design Specialist, Technical Trainer, Technical Writer, Desktop Support, and Administrator/Planners for Voice and Video over Internet Protocol.

In different circumstances, the District may require contract personnel for a variety of reasons: contingency/emergency, supplemental project staffing, seasonal workload augmentation, contract-to-hire, and/or other reasons. The District requires contractor agencies to provide a range of back-office support services relating to contract personnel, including security pre-screening, placement, compensation, time reporting and management, payroll, taxes, employment benefits, management statistics reporting to District, and retention management. However, agencies are not responsible for day-to-day management of staff, work product, project outcomes/deliverables, or task assignment.

Consultants will work primarily in project and operational environments in the District's central IT Department. However, the IT Department may from time to time facilitate placement of a Consultant in other District departments – including pre-kindergarten through grade 12 schools – to perform work specific to the host department, but under the overall supervision of the IT Department. In addition, some Assignments may require significant local travel among District facilities and other locations, as well as equipment handling such as lifting and hauling.

The following table provides a historical view into the District's use of IT hourly professional staffing services over the most recent four (4) fiscal years. This table is an approximate description of past activity only, and may not be a dependable indicator of future requirements. The District does not intend to require future services in the same quantities shown in this table, nor does the District intend to use the volumes represented in this table as a tool for evaluation of proposals under this RFP.

	07-08		08-09		09-10		10-11*		Total	
Description	Hours	Dollars	Hours	Dollars	Hours	Dollars	Hours	Dollars	Hours	Dollars
Segment I	60,921	\$1,493,186	48,489	\$1,214,983	54,530	\$1,335,765	28,844	\$696,872	192,784	\$4,740,806
Segment II	5,956	\$448,636	7,684	\$671,602	15,963	\$1,046,703	6,260	\$324,926	45,566	\$2,491,867
TOTAL	66,877	\$1,941,822	56,173	\$1,886,585	70,493	\$2,382,468	35,104	\$1,021,798	238,350	\$7,232,673

* 2010-2011, as of this writing, is understated as the school year is not yet complete

Proposers may respond to two categories (Segments) of work:

- a. Segment I:* Work requiring skill sets such as; general entry level IT resource; technical support; desktop support; help desk support; telephone system and equipment support; and junior level systems administration; to be bid at a specified per-hour rate. These positions are typically at a lower skill and complexity level, from one to three years of experience, with a high school diploma and additional computer science equivalent education, and will typically require more management supervision.
- b. Segment II:* Work requiring IT skill sets other than or more senior than Segment I, such as application developers, systems analysts, project managers, systems administrators, network engineers, etc., which shall be billed at variable rates applicable to the individual Consultant. These positions typically work more independently with objectives and/or deliverables in place. Workers for Segment II will typically have several years experience on relevant subject matter per job description, with more experience at progressive levels (intermediate and senior levels).

Workers will typically work to the District's specific project plans, and typically no more than a 40 hour week, a normal work week. Work schedules will typically align with the District's. If any holiday work is ever required or if time off plans need to be arranged, the District's Staff Calendar can be found here: <http://www.pps.k12.or.us/calendar/index.htm> (hold down ctrl key and click).

2.2 District Technical Environment

The District's present technical organization, architecture, and major applications are generally described below. The District will require Contractors to provide Consultants with the skills, abilities, and qualifications necessary to support the hardware and/or software systems listed in the context described. The descriptions below are not exhaustive, and the District may require additional skills, abilities, and qualifications as the District's projects and technical environment may require over the life of the Contract. In particular, the District may require Consultants to support evolving, exploratory, or newly adopted technologies that are not foreseen at this time. Equally, the District may not require Consultants to support each particular system described.

Infrastructure/Hardware Deployment – Data Network

The District operates more than 80 schools and other facilities, and the Blanchard Education Service Center (BESC) central administration building. All locations have been completely rewired, with fiber to the BESC and Cat 5e copper cabling to the other sites. Every classroom has at least two data outlets and one phone outlet. Most offices have a data and a phone outlet. The data network consists of high-speed routers that connect the District data center at the BESC with each school. A combination of switches within each building is used to interconnect each classroom and office. Cisco routers connecting the high schools were installed between 2002 and 2005. All sites are connected by a fiber ring as part of INET telecommunications efforts, and the current bandwidth configured on this network is 1 gigabit at the central office and 400 megabit at remote sites. The interconnection between router and switch is 100 megabits, and the switches provide 100-megabit connections to the desktop. The data center is connected to IRNE with district-owned fiber that runs from the data center to the Pittock Internet Exchange (a partner with the District, the City of Portland, and Multnomah County in developing the IRNE/INET).

Infrastructure/Hardware Deployment – Voice Network

The District's voice network includes Cisco Call Manager/Unity/IPCC for VoIP.

Infrastructure/Hardware Deployment – Desktop Equipment

The District uses a mixture of Apple and PC-compatible computers. PCs account for approximately 65% of all computers in the district, including laptops and desktops. Many elementary school environments are primarily Apple based, although some schools are migrating to PCs as new acquisitions and refresh opportunities arise. Typically, high schools use PCs, except for desktop publishing and multimedia instruction. The District inventory presently consists of approximately 16,000 desktop and laptop computers.

Infrastructure/Hardware Deployment – Operations Center

The District data center is housed at the BESC. The data center contains phone equipment, network equipment, and approximately 125 physical servers which also account for over 100 virtual servers. It is protected by air conditioning, fireproofing, a battery-uninterruptible power supply, and a back-up generator. A monitoring system provides rapid notification of abnormal environmental conditions. Our enterprise servers consist of Hewlett-Packard hardware and are located in the data center along with several web, file, print, and network management servers.

Application Development and Support

The IT Department's Application Development group is responsible for the implementation, integration, and maintenance of the district's support service systems and proprietary application development initiatives. Key applications are:

Web Applications

The District maintains a central web server architecture for use by all departments and staff. This web server contains the District's public Internet website maintained by personnel in several departments. We also have servers that house the Red Dot content management system (CMS), which is currently leveraged by all departments and schools to manage web-based content. Access to this web server is controlled through Microsoft Active Directory authentication process. The District is also planning to implement a web collaboration system based on Microsoft SharePoint technology.

E-mail

All District staff are provided with e-mail accounts. Microsoft's cloud-based email and calendaring system (currently dubbed Live@Edu) has been identified as the enterprise e-mail solution and there are future plans to implement email for students as well.

Student Information Systems

The District's student information system is called eSIS, from The Administrative Assistants Ltd (AAL). It is browser-based and uses an Oracle database that resides on a Dell/Sun server farm at the Multnomah Education Service District (MESD), which also provides services to seven smaller school districts in Multnomah County. Oregon school districts including Bend/LaPine, Beaverton, Eugene, and Hillsboro (along with several other ESDs) have joined the District in a consortium formed to share support and cost wherever possible. All District schools have been using the system since 2003-04. The District continues to plan for continued growth in functionality for eSIS.

PeopleSoft ERP

PeopleSoft Financials: Primary enterprise resource planning (ERP) system for financial management including general ledger, accounts payable, accounts receivable, billing, purchasing, and inventory management.

PeopleSoft Human Capital Management: The district's ERP system for human resources and staffing management, including payroll, recruiting, benefits, and time and labor processing.

Data Warehouse

Portland Public Schools utilizes a customized version of a data warehouse provided by Versifit to provide metrics and data on student achievement. PPS is currently providing an Administrator Dashboard on top of the data warehouse for school administrators, and we are planning to also implement a Teacher Dashboard in the near future. We are currently in the process of converting the data warehouse and reporting system from an Oracle to a SQL Server platform. The reporting system will be based on SQL Server Reporting Services (SSRS) along with ETL utilizing SQL Server Integration Services (SSIS). In the future, we may begin exposing reports through SharePoint. Going forward, the District will emphasize greater breadth and depth of use of the data mart and tighter integration with other enterprise systems.

SharePoint

Portland Public Schools is in the planning stage for rolling out SharePoint as a collaboration and workflow tool for district offices.

Budget Build

Proprietary forecasting and budget-building application. Originally developed using VB6, planning to upgrade to .NET.

iPAS

Intervention planning and assessment tool. This application was developed by Tigard School District in .NET, and customized by PPS. There may be future integrations with the Data Warehouse, Teacher Dashboard, and Gradebook.

School Choice

A School Transfer and Lottery application developed in .NET and SQL Server. This allows parents to submit applications for transfer, and a lottery selection engine for cases where there are limited slots available.

Autodialer

The Autodialer Automated Parent Notification System was installed in Portland Public Schools in early September 2004. This web-based system pulls data from eSIS, and provides administrators with the ability to deliver approximately 1200 automated telephone messages per hour. At the close of each school day, School Administrators receive an emailed report detailing information relative to the absences and status of the calls made to parents or guardians. PPS also subscribes to the Rapid Broadcast System for emergency and inclement weather notifications. For additional information, please visit the [Autodialer](#) resource page.

Certify

The [Certify](#)™ system notifies schools via weekly emails when certain data "rules" are broken. A simple click and login provides a list of records with errors, an explanation of the errors, along with instructions as to how to correct the data in the application.

EdBox

The EdBox is the district's vision of an integrated suite of teaching and learning software applications. PPS is currently advancing EdBox development in two significant areas: 1) **Gradebook**: During the 2010-11 academic year, the Gradebook will be field tested in some of our high schools. Within PPS, it will be referred to as the EdBox Gradebook, but it will essentially be the Pinnacle Grade module from GlobalScholar. 2) **Curriculum Planner**: During the 2010-11 academic year, the Pinnacle Instruction module from GlobalScholar will be introduced. The scope of implementation will be limited to the high school course guide courses and world languages materials adoptions.

Other Applications

- *ATS*: Risk management application that manages property and casualty claims and history.
- *Discipline*: Suite of portal-hosted applications designed to extract and present certain discipline-related information from the District's student information system (eSIS).
- *EduLog*: The primary transportation routing management system.
- *GetFacilities*: Web-based work order system for facilities management operations, maintenance processes, and reporting.
- *Portal*: District-wide initiative to deliver relevant and meaningful content from multiple applications to a single web page based on individual user preferences.
- *Reserve*: Web-based reservation system for civic use of buildings.
- *SEMS*: Web-based substitute management system for licensed general and special education staff as well as school secretaries.
- *Webevent*: Web-based calendaring solution that provides information at the individual school and district levels via the Internet.
- *WinSNAPP*: Primary nutrition system that manages inventory/purchasing and point-of-sale information.
- *Absolute Software*: Computer lifecycle management.
- *PPS Learning Campus*: Learning Management System using on-line courses.
- *Serebra*: In development.

District Needs, Priorities, and Applications (see above)

- Moving to take advantage of mature ERP systems (i.e. employee self-service, online time and labor, and eventually electronic procurement/supply chain management).
- Moving from top-tier platforms to more value based mainstream platforms that provide greater return on investment in terms of implementation and total cost of ownership for the district.
- Moving to a decentralized content management model that provides a graphical user interface (GUI) for managing, updating and editing content within district-provided templates/boilerplates.
- Moving to portal technologies to deliver data-driven decision making tools and applications by leveraging data warehouse technologies for all users based on role (i.e., building and central administration, teacher, student, parent, community member). A customer relationship management (CRM) functionality will improve the delivery of relevant content to both internal and external users. Redesign of the district website in the areas of wire-frame/site-map and look, feel and navigation perspectives. Electronic commerce services may also replace legacy e-commerce processes when appropriate.
- Moving to standards for vendor-supported application selection versus proprietary application development; business requirements gathering and analysis; project lifecycle methodologies and ongoing support and maintenance.
- Moving to streamline legacy business processes and technologies when possible.

Service Structure

The District has adopted Information Technology Infrastructure Library (ITIL) standards for organization of IT Department efforts. The first phase of ITIL implementation focuses on standardization of service delivery and service support processes. The next phase will focus on ITIL application development and infrastructure management.

Support/Maintenance Structure – Desktop Operating System Support

The IT Department includes staff members responsible for providing desktop operating system (OS) technical support. These staff members work directly with both the computer systems and with school personnel to troubleshoot and solve problems.

Support/Maintenance Structure – Desktop Hardware Support

The District maintains three-year warranty coverage on all computers to ensure that repair and replacement can occur on a timely basis.

Document Management System

The District has implemented a document management solution in an effort to: address issues related to security, reduce risk of loss, increase accessibility, and reduce access time. The document management system (DMS) is a combination of hardware and software that allows for the creation of an electronic version of each document, stored on hardware in the central office and backed up on a nightly basis for disaster recovery in case of damage. The flexibility inherent to this solution supports document scanning, storage, archiving, searching, and retrieval online and on-demand. Access is managed via identification of staff roles and job function, with the capacity to manage data down to the individual document level.

2.3 Position Descriptions

In Segment I, the District's emphasis will be on high-quality, quick-turnaround fulfillment of requirements according to specific position descriptions at set rates. In addition, District requirements may also entail high-volume fulfillment, i.e. assignment of multiple Consultants simultaneously. Each Contractor should be able to provide Consultants for all of the described positions.

The following role descriptions shall be incorporated directly into the Contract. Proposers shall propose specific hourly rates for each role (see Attachment D) and these definitions and corresponding hourly rates shall be incorporated into the Contract.

General entry level IT resource*Definition:*

Entry-level position providing IT specific support at the zero to two year experience range. This Consultant will gain experience in many areas of IT by assisting other members of the IT department.

Education:

High school diploma.

Experience:

Zero to two years of experience, with at least some in a technical area. Typically experienced with working with hardware (pc's, laptops, and mobile devices), internet, email, and boxed software or mobile apps.

Skills:

- a. Exhibits an interest in IT as a career path.
- b. Demonstrates basic knowledge of computers, servers, operating systems, and application software,
- c. Basic knowledge of Microsoft operating systems and products
- d. Good skills in working with others on team assignments
- e. Good skills in English grammar and punctuation; ability to express ideas clearly in writing.
- f. Strong ability to follow structured, documented procedures in a consistent and detail-oriented fashion.

Technical Support 1

Definition:

Entry-level position providing technical support and basic troubleshooting to users by resolving desktop software and hardware problems for Macintosh and Windows users. Participates in support to schools and administrative offices to assist in their use of technology and resolve minor problems. Participates in a central service desk. Also utilized on a project by project basis for varied field work.

Education:

High school diploma. Two-year certificate or degree in computer science or related field or equivalent experience is a plus.

Experience/Training:

One to three years experience in technical support or related field.

Skills:

- a. Demonstrated ability to perform basic troubleshooting of computers and peripheral equipment.
- b. Demonstrated knowledge of an operating system including Windows 2000, Windows XP and future Windows versions, and Macintosh Operating System 10.3.9 and future versions. Familiarity with multiple operating systems is preferred.
- c. Demonstrated knowledge of software packages such as MS Office, Outlook email and calendaring, and Internet tools is preferred.
- d. Entry-level experience with LANs and WANs including TCP/IP network configuration at the desktop level. Knowledge of Internet resources and hardware including Ethernet cards, hubs, switches and cables.
- e. Strong written, verbal and communication skills. Effective team player.
- f. Excellent English grammar and punctuation; ability to express ideas clearly in writing.
- g. Ability to follow structured, documented procedures in a consistent and detail-oriented fashion.
- h. Valid driver's license and personal vehicle available for site visits.
- i. Ability to lift up to 50 pounds.

Tasks/Duties:

- a. Provides resolution for a variety of technical problems including operating systems, hardware, printers, scanners, cameras and other peripheral equipment.
- b. Performs basic troubleshooting for a wide variety of desktop applications and on-line systems problems. Able to handle questions from users on the telephone and in person during school visits.
- c. Responds to trouble tickets and enters updates, closes and prioritizes calls in trouble ticket database.
- d. Assists local personnel with basic hardware and software questions and issues, and provides technical support as required at the basic level.
- e. Develops and maintains technical expertise in new system software, including Finance, Payroll, Human Resources and Student systems.
- f. Maintains a positive and constructive working relationship with all District departments and other schools and worksites to optimize communication.
- g. Work with District clients and IT Department staff to gain a thorough knowledge of business and technical needs.

- h. Other related duties as assigned.

Technical Support 2

Definition:

Intermediate-level position providing technical support and troubleshooting to users by resolving desktop software and hardware problems for Macintosh and Windows users. Participates in a centralized telephone Service Desk to assist District personnel in their use of technology. Provides mentorship for Technical Support 1 staff. Also utilized on a project by project basis for varied field work.

Education:

Two-year certificate or degree in computer science or related field or equivalent experience.

Experience/Training:

A minimum of four years experience in technical support or related field; demonstrated ability to troubleshoot computers and peripheral equipment. Desktop support and operating systems certifications a plus.

Skills:

- a. Demonstrated ability to perform advanced troubleshooting of computers and peripheral equipment.
- b. Demonstrated knowledge of multiple operating systems including Windows 2000, Windows XP and future Windows versions, and Macintosh Operating System 10.3.9 and future versions. .
- c. Demonstrated knowledge of hardware and software such as MS Office, e-mail, and Internet tools. PeopleSoft, eSIS, Microsoft server environments, and application troubleshooting and administration skills are desirable.
- d. Intermediate experience with LANs and WANs including TCP/IP network configuration at the desktop level. Knowledge of Internet resources and hardware including Ethernet cards, hubs, switches and cables.
- e. Experience with Microsoft server architecture.
- f. Shows working knowledge of project management theory and practice; ability to perform aspects of project management under supervision.
- g. Strong written and verbal communication skills. Effective team player.
- h. Excellent English grammar and punctuation; ability to express ideas clearly in writing.
- i. Ability to follow and/or design structured, documented procedures in a consistent and detail-oriented fashion.
- j. Valid driver's license and personal vehicle available for site visits.
- k. Ability to lift 50 lbs.

Tasks/Duties:

- a. Mentors Technical Support 1 techs by phone or on-site to increase their knowledge. Troubleshoots high level technical issues escalated from Technical Support 1 techs.
- b. Provides project support for lab deployment, special site support, analysis of environment to make recommendations for new purchases, printing and wireless deployments.
- c. Manage multiple queues in tracking software.
- d. Provides resolution for diverse technical problems including desktop operating system, printers, scanners, servers and other peripheral equipment. Resolves connectivity problems with TCP/IP network connections to the wall jack and network printers.
- e. Troubleshoots a wide variety of desktop applications and on-line systems problems and questions from administrative users on the telephone and office and school visits.
- f. Responds to user requests for technical information via telephone, fax and e-mail.
- g. Enters and prioritizes problem calls in trouble ticket database. Responds to calls from queue and provide problem resolution for knowledge database.
- h. Writes, designs and updates web based technical support resources based on questions and problems presented by District users to the Service Desk.
- i. Evaluates new software and hardware as technology changes are reflected in District standards and needs.
- j. Maintains current expertise in the rapidly changing area of technology and utilizes proven and accepted techniques when implementing technology solutions.
- k. Recommends and participates in technical training classes. Provides technical materials for classes as needed.
- l. Develops and maintains technical expertise in new system software, including Finance, Payroll, Human

Resources and Student systems.

- m. Maintains a positive working relationship with all District departments and other worksites to optimize communication.
- n. Other related duties as assigned.

Systems Administrator 1

Definition:

As part of the District's Information Technology Department, the Systems Administrator 1 is a junior member of the group responsible for the setup, installation, configuration, operation, maintenance and troubleshooting, update and backup of server based systems and applications that support District technical operations. Installs, configures, and provides technical support for Windows, Microsoft server, and Linux based servers, software and hardware. Work will be performed substantially independent of immediate supervision.

Education:

One or more of the following:

- a. Associates degree or equivalent experience.
- b. Progress toward Microsoft certification(s).
- c. Windows administration certification, or progress toward certification.

Experience/Training:

At least two of the following:

- a. A minimum of 3 to 4 years systems administration experience required with Windows and/or Linux, including RedHat.
- b. At least 3 to 4 years experience with LDAP, Active Directory experience preferred.
- c. Prefer 2 to 3 years experience with Microsoft Servers and associated applications. Experience in Mac OS administration is desired.
- d. At least 3 years experience in programming with Perl, shell scripts, C and PHP is preferred.
- e. Some familiarity with UNIX operating systems and the ability to learn basic UNIX system administration.
- f. Experience with Internet protocols as well as Windows and Macintosh based client software.

Skills:

- a. Demonstrated knowledge of software and hardware standards requirements and enforcement, principles of operation and general methods of system troubleshooting and interoperability.
- b. Excellent written and verbal communications skills.
- c. Valid driver's license and personal vehicle available for site visits.
- d. Demonstrated knowledge of and/or experience with one or more of the following may be required:
- e. OS 10.2 Server and above
- f. Microsoft Exchange experience, for current and earlier generations
- g. Microsoft SQL server experience
- h. Samba
- i. Mac OS 9.2 and above
- j. RedHat server OS
- k. Load balancing software
- l. TFTP, DHCP, PXELinux netbooting services

Tasks/Duties:

- a. Participates in requirements definition, hardware/software specification, configuration development and installation, operation, and troubleshooting of District servers and applications.
- b. Operates, maintains, designs and implements Apple OSX Server solutions and Mac platform integration solutions.
- c. Tracks, performs and monitors the results of updates to system and application hardware/software.
- d. Performs preventative maintenance on servers and associated hardware, including backup and recovery procedures per District policy
- e. Maintains and monitors security functions on District's Windows systems.
- f. Performs basic UNIX system administration functions.
- g. Acts as Mac OS systems administrator, and ensures a high degree of reliability, visibility, operability and documentation for all Unix-based systems.
- h. Develops and maintains a complete set of up-to-date documentation for all assigned systems in accordance

with local and industry guidelines.

- i. Provides support to other IT groups and functions in support of IT objectives. Supports and coordinates with other IT and outside agency personnel in troubleshooting and resolving system problems.
- j. Provides system administration services for a wide variety of applications and platforms, including Mac, Linux (RedHat), Apache, Samba, load balancing software and anti-virus systems.
- k. Defines and maintains software and data backup schedules and scheduled tasks for assigned servers and systems to ensure data integrity and continuity of system data and files.
- l. Develops and maintains server and network monitoring plans to ensure that all systems are monitored and system parameters are regularly logged in accordance with IT standards.
- m. Develops, installs, maintains, operates, and troubleshoots Windows Server and IIS-based systems and applications.
- n. Other related duties as assigned.

Telephone Technician

Definition:

Position provides telephone systems support, maintenance, configuration and troubleshooting services in support of the District's telephone systems and cable plant. There are approximately 135 analog and key system telephone switches, distributed throughout the district. The Consultant is required to provide his/her own transportation and tools. Limited District-owned tools will be available, and are generally limited to expendable items (i.e.: punch tools). Transportation of equipment from the District IT offices to sites is intermittently required.

Education:

High school diploma, plus education necessary to obtain one of the licenses stated below.

Experience/Training:

Consultants must have one of the following low-voltage electrician licenses:

- a. Limited energy technician/electrician certification, Class B, issued by the State of Oregon with at least 6 years of direct low voltage technician experience
- b. Limited energy technician/electrician certification, Class A, issued by the State of Oregon with at least 4 years of direct low voltage technician experience as a Class A certified technician

Skills:

- a. Cisco VoIP cabling and configuration or similar new technology experience
- b. Old telephone system support, including moves, adds, and changes,
- c. Mitel SX-50 or SX-100 installation, configuration, preventive maintenance, troubleshooting and repair or equivalent experience for similar hardware
- d. Mitel SX-200 installation, configuration, preventive maintenance, troubleshooting and repair, or equivalent experience for similar hardware
- e. NEC NEAX-2400 IMG configuration, troubleshooting and repair, or equivalent experience for similar hardware
- f. Cat 5e cable specification, installation, repair and maintenance
- g. 66 and 110 cross-connects
- h. Cabling testing and certification, including all standard Cat 5e tests
- i. Fiber-optic cabling provision, termination, maintenance, troubleshooting and repair, both single and multi-mode
- j. Project skills including Microsoft Excel, Word, and some project management software (Project) use
- k. Soft skills including strong interpersonal skills and the ability to follow directions
- l. Desirable, but not mandatory skills, include Ethernet jack repair and replacement, Cisco VoIP phone, elevator phone, and intercom speaker skills and/or experience.

Tasks/Duties:

- a. Participate in and adhere to all District processes and procedures related to service requests, incident and problem management, and cable installation and repair.
- b. Perform repairs and configurations as assigned by the District's Service Desk.
- c. Provide a driver's license and personal vehicle for site visits.
- d. Provide tools. Limited District-owned tools will be available, and are generally limited to expendable items (i.e.: punch tools).
- e. Transportation of equipment from the District IT offices to sites is intermittently required.

- f. Related duties as required. A typical example is: position responsibilities will include cutting over POTS (Plain Old Telephone System) lines from District's current supplier to a new supplier at 85 sites in the Portland Public School District. Coordinate installation and cutover of POTS lines with a new supplier with as little disruption to the school's staff and students as possible. Also responsible to coordinate and work with our facilities department to arrange the cutover of fire, intrusion and elevator alarm lines at each site. Other duties that may be assigned from time to time include trouble shooting, and replacing or installing phones. Duties include working with and providing telecom support to administrative personnel, principals, secretaries, and teachers.

2.4 Sample Position Descriptions (Segment II)

In Segment II, the District's emphasis is on access to a very broad range of IT skill sets, meeting any of the areas described in Sections 2.1 and 2.2, or any evolving, exploratory, or newly-adopted technologies that are not foreseen at this time. Assignments will normally be on a one-at-a-time basis with careful review of qualifications for best fit to a particular requirement, and a corresponding acceptance of flexible Billing Rates. Each Contractor should be able to provide Consultants for many or all of the positions described, but Contractors under Segment II will not be specifically qualified for any subset of these positions.

The following role descriptions are for the general information and reference of Proposers only, and are presented to broadly describe the breadth and major features of the skills the District is likely to require. This list shall not be construed to place limitations on the Contract: The District may not require some of the roles listed, the District may require some roles not listed, and the roles the District does require may differ in detail or emphasis.

General definitions are shown below for the following roles, and for each Assignment the specifics may vary:

- Applications Developer
- Business Analyst
- Business Intelligence Application Developer
- Systems Administrator
- Applications Administrator
- Database Administrator
- Network Administrator / Planner
- Technical Trainer
- Project Manager
- New positions (in support of an evolving school district)

For each of these role descriptions, professional levels are generally categorized as follows:

JUNIOR – Provides professional functional and/or programming support to higher level staff. Position is usually limited in its application of functional area theory and principles and develops solutions to problems of limited scope. Position usually requires two to three years' related experience.

INTERMEDIATE – Positions at this level exercise full use and application of standard principles, theories, and concepts related to technical discipline and provide solution to a variety of moderately complex problems. Establishes and implements new or revised systems requirements or procedures. Analyzes user requirements, develops and implements systems for moderately complex processes. Initiates corrective action to stay on schedule. Position usually requires at least three to four years of related experience.

SENIOR – Positions at this level use a wide application of complex principles, theories, and concepts in the specific field, plus may have working knowledge of other related disciplines and provide solutions to a wide range of difficult problems. Completes work on complex projects or tasks. Analyzes and evaluates existing or proposed systems and devices or modifies procedures to process data and solve problems. Reviews schedules, cost and documentation to ensure success of projects. Coordinates activities of team and acts as a source for direction, training, and guidance for less experienced staff. Position usually requires five or more years' related experience.

Applications Developer

Conducts applications systems and client server analysis, development, and programming. Interfaces with functional leads, business analysts, and users to determine system requirements. Develops application technical designs for multi-tier applications, including diagrams and flow charts for both technical, business and management audiences. Develops and executes test scripts, performs regression engineering, and manages issues and bugs for applications. Skilled at application integration, developing interfaces and ETL utilizing API and web services. Skilled at relational database development, SQL Server, stored procedures, and query optimization. Familiar with the Software Development Lifecycle, division of duties, and change management in an enterprise environment. Prepares documentation of program development and operating instructions for the user. Revises existing programs, systems, and procedures.

Business Analyst

The Business Analyst is responsible for coordinating the intake, definition, and implementation of client requests for changes to district enterprise applications, and other technology services. This position has primary accountability to deliver appropriate technology system enhancements, in support of negotiated service level agreements. This position serves as the primary user contact, technical consultant, technical advisor, and coordinator for system enhancement or development requests. The Business Analyst is accountable for business process analysis, definition of functional requirements, system design, implementation plans, testing, and documentation. Conducts operational and organizational studies on business units. Analyzes structure and flow of work through business unit and recommends changes to improve operations. Devises test plans, builds test data, and tests new or enhanced application functions.

Business Intelligence Application Developer

The Senior Business Intelligence Application Developer coordinates with the development team, functional leads, and system and database administrators to design, develop, test, deploy, and maintain multi-tier object oriented and Business intelligence applications. This position's primary responsibility involves creating solutions for data extraction from multiple sources, analytics, presentation, and reporting in a Data Warehouse environment. This position is also responsible for integration of processes between various enterprise systems, and for supporting the development, maintenance, and enhancement of a number of applications with varying complexity and requirements in support of district wide clients.

Systems Administrator

Provides for the purchase, installation, operation, troubleshooting, and maintenance of server hardware for the District. Analyzes business requirements; evaluates and recommends hardware options and capabilities. Negotiates and documents hardware acquisition from vendors. Performs equipment order processing, inventory, and configuration management. Coordinates the maintenance, repair, and replacement of hardware. At the senior levels, provides long-term system architecture and capacity planning, including resource utilization profiles and data storage models, analysis of growth trends and emerging technologies, calculation of future capacity requirements, and recommendations for future acquisition planning. May perform duties of an applications administrator, especially with regard to operating systems, file and print management, e-mail, and infrastructure software

Applications Administrator

Provides technical analysis, installation, operation, maintenance, and modification of operating system software. Determines best system software configuration ensuring hardware/software compatibility. Evaluates and recommend new system software products. Installs, tests, and implements new system software and manufacturer's maintenance releases and utilities. Analyzes system performance to ensure it is meeting availability and performance objectives. Resolves system software problems. Develops documentation on system specifications and operating instructions.

Database Administrator

Provides technical design, development, operation, troubleshooting, and maintenance of databases to provide for the accessibility, security, and integrity of data. Includes logical data analysis and modeling; physical database design, programming, and implementation; database performance monitoring, tuning, planning, and problem resolution; and database schema and index administration. Acts as consultant to other IT functional areas concerning database related issues. May perform duties of an applications administrator, especially with regard to certain enterprise business application systems.

Network Administrator

Designs, implements, operates, troubleshoots, and maintains the District's LAN and WAN network systems for data and voice (including VoIP); responds to user problems, diagnoses problems using network system tools, recommends solutions, and coordinates repair efforts; provides for work order generation, moves, adds, changes, fault protection, trouble detection and correction, traffic measurement, circuit analysis, path testing, and maintenance. At the intermediate and senior levels, analyzes business needs of the user and recommends solutions for the hardware and/or software systems; researches and recommends appropriate system solutions to meet user requirements, including architectural configurations, wiring requirements, recommendation of hardware and telecommunication service acquisitions, and supervision of installations; prepares detailed specifications, flowcharts, and diagrams for implementation of new internal programs or modifications to vendor software; coordinates system installations with vendors and with systems software programmers; provides regulatory monitoring and network analyses to support short and long range planning.

Technical Trainer

Develops and conducts IT training programs for District management and staff. Conducts assigned workshops using adult learning techniques to facilitate development of management skills and communication of District policies and practices. Researches available training sources for appropriate content and method information. May track training effectiveness and problem areas and make policy/training recommendations. Works cooperatively with functional and technical departments to determine training requirements and optimal training formats. Requires facility with design and delivery of on-line training and knowledge of current e-learning techniques and systems. Requires proven technical training skills, a degree, and 5 or more years experience in technical training.

Project Manager

Supervises, schedules, and coordinates projects that support the requirements of the IT Department and/or one or more individual schools or functional departments. Assigns and monitors tasks ensuring that deadlines and budgets are met. Evaluates project progress and results according to District Project Lifecycle methodology. Determines user requirements, establishes priorities, plans, directs, and monitors work. Evaluates project status and resource utilization and recommends changes to improve efficiency. Generally responsible for all work requirements on assigned projects or major phases of certain very large projects. PMP or similar certification desirable, but not required. Requires detailed understanding of the technologies and best practices of the particular project subject matter, and ability to build and supervise a team of District staff and/or Consultants.

New positions (in support of an evolving school district)

Additional positions related to emerging technologies such as, but not limited to: Unified Messaging; Cloud technologies; School and Classroom Modernization efforts, including access controls, video surveillance; IT asset tracking; digital rights and licensing management; virtualization (both server and desktop); and mobile computing.

2.5 Key Personnel

The Contractor shall identify Key Personnel. The Key Personnel team shall consist of at least one individual; in Key Personnel teams of more than one individual, the Contractor shall identify one Key Personnel team member to have managerial responsibility for the District's account. The Contractor shall inform the District of direct contact information and roles for all Key Personnel, and promptly inform the District of any changes in contact information.

2.6 Consultant Benefits

The District encourages Contractors to provide benefit plans to Consultants as appropriate. Contractor shall be responsible for all benefits administration. If provided, benefit costs must be rolled into the Billing Rate. For Segment I, these benefits costs must be included in the rates proposed (Attachment D). Benefits costs shall not be charged to the District on any other line or portion of the invoice. The District shall not pay for benefits costs that are not incorporated into the Billing Rate, and if a Consultant refuses any benefit the bill rate shall be adjusted accordingly. These provisions are auditable by the District.

2.7 Contractor and Subcontractor Fingerprint-Based Criminal History Verification

The District requires all Contractor personnel working on school sites to pass the District fingerprint-based criminal history verification. The Contractor is solely responsible for the cost of these verifications. The current cost is \$82 and is subject to change. Proposers are advised to consider this cost when responding to price proposal evaluation criteria as the District will not pay for, or reimburse, such costs.

Additional information about this verification process may be found at:

<http://www.pps.k12.or.us/departments/security-services/1102.htm>.

2.8 Additional Terms and Conditions of the Contract

See Attachment E “Supplemental Terms and Conditions”

3 Proposal Format, Content, and Submission

3.1 Proposal Format

District proposal standards:

- a) Proposal includes a one-page cover letter as the first page of the proposal.
- b) Proposal Includes Attachment B as the second page of the proposal.
- c) Proposal addresses all evaluation criteria in the order presented in 3.2
- d) Proposal is 30 pages or less in length, not including reports, resumes, and like attachments.
- e) Proposal is double-sided when possible. Double-sided sheets are considered equal to two pages.
- f) Proposal is prepared simply and economically, and is comprised of recyclable and, ideally, recycled materials. Proposal is stapled rather than bound.
- g) Proposal must clearly specify the Proposer's intent proposing for either Segment I, Segment II, or both.

Please do not include sales or promotional materials as part of proposal unless requested.

3.2 Proposal Content

Include the content listed in Table 3.2-1.

Proposals shall include all designated mandatory requirements. Proposals lacking one or more of the mandatory requirements may be rejected as non-responsive. Mandatory requirements are designated by a check mark in the "Mandatory" column of Table 3.2-1 below.

Table 3.2-1

Proposal Content		Mandatory	Scored	Optional
Proposer Certifications and Representations, signed in ink or indelible pencil. Indicate level of acceptance with terms and conditions provided in the solicitation documents.	3.1.1; Attachment B	☒	☐	☐
Evaluation Criteria Responses				
References	Attachment C-I Attachment C-II	☐	☒	☐
Cost Proposal	Attachment D	☐	☒	☐
Response to section 3.3.1		☐	☒	☐
Response to section 3.3.2		☐	☒	☐
Response to section 3.3.3		☐	☒	☐
Response to section 3.3.4		☐	☒	☐
Response to section 3.3.5		☐	☒	☐
Response to section 3.3.6		☐	☒	☐
Response to section 3.3.7		☐	☒	☐

3.2.1 Attachment B: Proposer Certifications and Representations

Include a completed Attachment B: Proposer Certifications and Representations form, signed in ink or indelible pencil. An electronic signature shall not be accepted in lieu of an original handwritten signature.

3.3 Proposal Responses to Evaluation Criteria

Address each of the following Evaluation Criteria completely, and in the order provided:

3.3.1 Organization (10 points available)

Provide an overview description of the proposing firm, its location, history, number of full time employees, and number of Consultants in the firm's pool, company philosophy, and client focus. Describe the firm's experience serving public agencies and school districts. Provide an organization chart. This chart may be included in the appendix and will not be counted toward the page limit.

Evaluation Criteria: A clear and understandable introduction to the proposing firm is provided and is complete as described above. An organization chart is provided that is clear and comprehensive.

3.3.2 Capacity – Segment I only (20 points available)

Provide a response to this section only if you are proposing in Segment I.

1. Describe your firm's clients that are similar to the District, in size, business type, and/or needs. How many Consultants of the types described in Section 2.2 did your firm supply to these clients from July 2008 to the present? What were the position titles? How did your firm respond to those clients' requirements for high volumes of Consultants?
2. How large a pool of Consultants do you maintain for assignment to clients? How do you manage this pool to ensure that sufficient Consultants are available to respond to high-volume requirements (15-20 Consultants within 1 week)?
3. How have you maintained a high average level of qualifications among Consultants when they are assigned to clients in high volumes and short timelines? Do you experience a trade-off between (a) high volumes and short timelines, and (b) quality of Consultants provided? What strategies do you use to mitigate such a trade-off?
4. Describe the team structure of your Consultants when assigned to clients in large groups.

Evaluation Criteria: An ideal proposal will demonstrate the Proposer's ability to provide Consultants to the District in high volumes and on short timelines, while maintaining a high level of Consultant qualifications and experience.

3.3.3 Consultant Pool – Segment II only (50 points available)

Provide a response to this section only if you are proposing in Segment II.

Using Attachment C-II, provide resumes for **six** Consultants actually placed with customers since September 1, 2009 in the greater Portland/Salem/Vancouver (WA) metropolitan areas. At minimum, the resumes submitted should represent placements with at least three customers. In addition to the complete resume, required information includes Consultant name, placement date, position/emphasis category of the assignment (see below), assignment duration, assignment location, customer contact information for references and verification, and the Billing Rate charged to the customer. All requested information must be provided.

Each resume provided must fall into one of the following four position/emphasis categories. For working definitions of each position, see section 2.3. Proposers are not required to provide resumes in all of the four position/emphasis categories, but a total of six resumes must be provided.

Position: Applications Developer, Intermediate	Emphasis: PeopleSoft or equivalent ERP system
Position: Business Analyst, Junior	Emphasis: Web Applications Infrastructure
Position: Network Administrator, Intermediate	Emphasis: Cisco related, or equivalent
Position: Project Manager, Junior or Senior	Emphasis: Hosted software solution or equivalent

The District may verify the information provided as part of the Proposer's reference checks.

Evaluation Criteria: The proposal should demonstrate the Proposer's ability to deliver Consultants across the range of District requirements, and depth in providing consultants in some of the high-priority categories listed. Resumes submitted should further demonstrate a high level of experience and qualifications delivered for reasonable Billing Rates, and overall competitive Billing Rates compared against other Proposers.

3.3.4 Procedures and Policies for Consultant Provision and Contract Administration (30 points)

Proposers are instructed to provide answers to each of the questions and issues listed below. If a Proposer is offering a proposal in both Segment I and Segment II, answers may vary with respect to one Segment or the other. If the response to a question is identical for both Segments, please indicate this in your response to Segment I and specify "See Segment I" in your response for Segment II. It is important that the Proposer's intentions are clear in this regard; do not leave any questions blank.

Proposers should note that several of the following questions request the Proposer to either accept a default term or policy described by the District in Attachment E, to propose an alternative term or policy, or in some cases to decline the term or policy altogether. Alternate terms and policies deemed by the District to be less favorable to the District than those stated in this RFP shall result in the loss of evaluation points.

IMPORTANT: This RFP is designed to establish the District's requirements not only for the nature and pricing of services to be provided, but also the Contract terms that apply to ongoing Contract administration. Proposers may wish to open up some of these Contract terms for negotiation after awards are made. The District will be open to a limited amount of negotiation, but any changes *must* be requested in the proposal. The questions below (see especially question #20) offer opportunity to state these change requests. Changes requested will affect proposal evaluation scores. ***Any requested changes not stated in the proposals will not be considered in Contract negotiation.*** Even if a change is requested here and the District awards a Contract to the Proposer, the District may still decline the proposed change.

1. Describe your method for recruiting Consultants. What strategies do you use to ensure that you are able to offer the District Consultants with fully up-to-date skills and industry experience? How will you ensure that the skills the District requires will be available when the District requires them? If you are proposing under Segment I, how will you ensure that you will be able to provide Consultants in sufficient numbers to meet District workload requirements?
2. Is diversity a part of your recruiting strategy? Within the bounds of your answer to the previous question, describe your approach to increasing diversity among the candidates you might offer to the District – including ethnic, religious, gender, orientation, etc.
3. How will you pre-screen candidate Consultants for match to the District's requirements prior to offering them to the District? How will you minimize the need for the District to reject candidates based on insufficient qualifications?
4. Describe your security procedure as required in the "2. Security" section of Attachment E.
5. Describe your plan and strategies for retaining Consultants once they are placed in a District Assignment, for the duration of that Assignment.
6. Describe your procedure for ensuring compliance with all laws and regulations governing whether an individual Consultant may legally work in the United States for the duration of the District's required Assignment. How do you approach H-1B visas and other mechanisms for legal entry and work in the United States? (You may also wish to address H-1B visas with regard to question #1 above.)
7. What are your compensation policies for Consultants? How do you determine Wage Rates?
8. Describe the benefits plans available to Consultants, including all insurance, medical coverage, EAPs, ESOPs, paid and unpaid leave, and other benefits. Describe the relative contributions made to benefit plans by the Contractor and the Consultant. If benefit plans available to employees vary by duration of Assignment or by other factors, provide a complete listing of benefit plan levels available to employees

and the eligibility criteria for each plan level.

9. What are your policies for offering professional development opportunities to Consultants?
10. Describe your policies for administration of leave in compliance with requirements for approval by the District as described in the “10. Scheduling and Time Off” section of Attachment E.
11. Describe your retention plans and strategies for Key Personnel. In the event of the departure of a Key Person, what will be your approach to recruiting for the vacancy?
12. Describe your approach to use of subcontractors to provide Consultants for assignment to the District. Describe your policies for managing subcontractors and subcontractor Consultants, and for ensuring that all policies and practices (whether required by the District or offered by you) are applicable to subcontractor Consultants you will offer to the District. Provide assurance that your policies are consistent with the requirements stated in the “21. Subcontracting” section of Attachment E. Identify any subcontractors you will wish to have immediately approved for use with the District’s account.
13. Describe your timekeeping method for use with Consultants. Review the “11. Timekeeping” section of Attachment E and specify how you will meet the minimum required features listed. State if you will provide data collection and reporting functionality in addition to the minimum requirements, and provide details. Your response *must* include copies of paper timesheet forms, screenshots of any electronic timekeeping system, and license terms for such an electronic system.
14. Review the “19. Billing and Payment Terms” section of Attachment E. State your acceptance of the terms as presented by the District *in each particular*, or propose an alternative billing method and/or payment terms. Attach a sample copy of your company’s invoice. In addition, will you offer the District any discount for prompt or early payment of invoices?
15. Review the “9. Payment for Overtime” section of Attachment E. State your understanding of the District’s specification that all hours shall be billed to the District as specified in Attachment E. Otherwise, propose a detailed alternate plan by which you will adjust Billing Rates to recover costs for Overtime.
16. Review the “16. Contract-to-Hire” section of Attachment E. State your acceptance of the terms as presented by the District *in each particular*, or propose an alternate contract-to-hire arrangement. In particular, detail any proposed alternate method of calculating conversion fees and criteria for determining when conversion fees are due.
17. Review the “22. Unscheduled Termination of Assignments” section of Attachment E. State your acceptance of the liquidated damages terms as presented by the District, or state your proposed alternative remedy for Consultant departures without required advance notice.
18. *(Segment I only.)* Review the “20. Price Escalation” section of Attachment E. State your acceptance of the Segment I terms as presented by the District *in each particular*, or propose an alternative escalation method.
19. *(Segment II only.)* Describe your method for ensuring that the bill rates you offer to the District on an ongoing basis are competitive against industry benchmarks.
20. Review all of the District’s terms and conditions included in Attachment A, Attachment E, and elsewhere in this RFP. If you will wish to request any alternate terms or changes to terms at the time of Contract negotiation, then state those requested terms or changes here. If you have made such a request in response to any of the questions in this section, you need not repeat those particular requests here. Change requests not stated in the proposal *will not* be considered by the District to be available for future negotiation. Below is point breakdown associated with acceptance of supplied District Terms and Conditions. **Please indicate your level of acceptance in Attachment B.**

Full acceptance, no changes	10 Points
Partial acceptance, minimal changes	5 Points
Rejection of all terms and conditions	0 Points

Evaluation Criteria: The proposal must answer all questions clearly, concisely, and completely. The proposal should demonstrate procedures and policies that will provide the District with a high-quality and stable supply of Consultants over time, within the District's contractual requirements. The ideal proposal should meet or exceed the District's terms and conditions. If a Proposer responds to both Segment I and Segment II, each Segment may be scored differently as the answers to the questions above may have different implications depending on the Segment.

3.3.5 Key Personnel (10 points)

Provide the following:

1. Descriptions of the qualifications and experience of each individual Key Personnel member (e.g. resumes).
2. An organization chart showing the reporting relationships among Key Personnel, Escalation Paths, and an escalation procedure for use as specific problem issues arise.
3. A description of the division of duties among the Key Personnel, including how effort will be allocated between the District's account and other customers.
4. A plan for optimizing availability of Key Personnel to respond to District requirements as promptly as possible.
5. A retention plan for Key Personnel to minimize turnover in positions of critical importance to the Contract.

Functions executed by the Key Personnel included in the above documentation should include, at minimum:

- Account manager with overall responsibility for the District's business
- Placement, i.e. matching prospective Consultants to the District's requirements
- Recruiting

It is not required that Proposers identify separate individuals with responsibility for each of these functions; one Key Personnel individual may have responsibility for two or more of these functions. However, the District will take such configuration of Key Personnel into account when conducting its evaluation of the proposals.

Evaluation Criteria: The proposal must demonstrate that the Proposer will offer the District a team of Key Personnel that can effectively and timely respond to the District's needs with respect to the contracted services, both routine and unforeseen.

3.3.6 References – Segment I only (20 points)

Provide a response to this section only if you are proposing in Segment I.

On Attachment C-I, provide a minimum of three client references with respect to Segment I. The District can be used as a reference.

Evaluation Criteria: The ideal response should demonstrate consistently high customer service, adherence to contract terms, high standards of Consultant performance, and an ability to respond to either high-volume requirements and/or short timelines.

3.3.7 References – Segment II Only (20 points)

No response to this section is necessary separate from the response to "Consultant Pool" above.

From the customers identified by the Proposer when submitting resumes for "Consultant Pool" above (see also Attachment C-II), the District may select three customers at random for verification

of the data provided and additional reference questions with respect to Segment II.

Evaluation Criteria: The ideal response should demonstrate consistently high customer service, adherence to contract terms, high standards of Consultant qualifications and performance, and resourcefulness in providing Consultants to unique, low-availability, or unforeseen requirements.

3.3.8 Cost – Segment I Only (30 points)

Supply pricing information on Attachment D. Provide this information *only* if you are proposing in Segment I.

Evaluation Criteria: As stated in Attachment D.

3.3.9 Cost – Segment II (no points available)

Cost information for Segment II will be evaluated as part of “Consultant Pool” above.

Evaluation:

SEGMENT 1	
Organization	10 points
Capacity	20 points
Procedures and Policies for Consultant and Contract Administration	30 points
Key Personnel	10 points
References	20 points
Cost	30 Points
Total Possible Score: 120 points	

SEGMENT 2	
Organization	10 points
Consultant Pool	50 Points
Procedures and Policies for Consultant and Contract Administration	30 points
Key Personnel	10 points
References	20 points
Total Possible Score: 120 points	

3.4 Proposal Submission

Provide one hardcopy original proposal and 8 (eight) complete hardcopies to:

Ryan Allen
Portland Public Schools
School District No. 1J, Multnomah County, Oregon
Bid Desk, Procurement Services Department
501 North Dixon Street, 2nd Floor, #264
Portland, Oregon 97227

Proposals are due no later than the due date and time shown on page 1 of this RFP.

It is the Proposer’s sole responsibility to ensure that its proposal is delivered and time-stamped, at the Bid

Desk, prior to the RFP closing date and time.

Proposals not time-stamped at the Bid Desk by the due date and time shall be considered late. District shall deem such proposals ineligible for award consideration.

Proposals will be submitted in a sealed envelope, or box, with the following information provided on the outside of the package:

- a) RFP Title
- b) RFP number
- c) Proposer name
- d) Proposer address

4 Proposal Evaluation and Award

4.1 Clarification of Responses

In the event that one or more proposals are in need of clarification, the District will request such clarification in writing and will afford the Proposer(s) contacted an opportunity to respond in kind, with the necessary clarification.

4.2 Proposal Evaluation

The evaluation process of this RFP will be comprised of a written Proposal evaluation process. An Evaluation Committee, consisting of not less than 3 individuals, shall evaluate the proposals. Each evaluator will independently evaluate and score proposals in accordance with the Evaluation Criteria. The District may assign certain evaluators specific evaluation criteria, in alignment with the evaluator's expertise.

Please note that if a Proposer addresses both Segment I and Segment II, each Segment will be scored independently. A Proposer may be awarded under Segment I, but not Segment II or vice-versa, or a Proposer may be determined qualified for both.

If proposing for both Segments, a Proposer need not supply two separate proposals, and a single response to evaluation areas 3.3.1 and 3.3.5 is sufficient; the Proposer must address evaluation 3.3.4 as indicated within that item.

If it is determined to be in the best interests of District, an oral evaluation will also be scheduled. Respondents within the competitive range will be invited to an oral interview with the evaluators. The same criteria used to evaluate the written responses will be used to evaluate the finalists during the oral evaluations. After the oral evaluation, the evaluators will re-assess their score to each evaluation criterion, and make adjustments as appropriate.

The District may appoint separate evaluation teams for each tier of the evaluation process.

4.2.1 Written Proposal Evaluation

- a) Each evaluator shall independently score proposals in accordance with the Evaluation Criteria.
- b) District Procurement Services, or its designee, shall evaluate fee proposals.
- c) The District shall average the scores per category and then sum the category averages for a total written evaluation score for each proposal.

4.2.2 Establishment of the Competitive Range

- a) If the District elects to solicit best and final offers, the District will establish a Competitive Range after evaluating all responsive proposals in accordance with the Evaluation Criteria.
- b) The District anticipates establishing a Competitive Range which will consist of a minimum of three Proposers.
- c) The District shall then rank proposals in the Competitive Range.
- d) The District will notify Proposers of the Competitive Range. Notification will be posted on ORPIN.

4.2.3 Best and Final Offers

At its sole discretion, the District may require Best and Final Offers.

At its sole discretion, the District may re-establish the competitive range, based on written and interview evaluation. If the District exercises this option, it will require Best and Final Offers from Proposers within the re-established Competitive Range.

In the event District requires Best and Final Offers, it shall establish a common date and time by which eligible Proposers must submit such Best and Final Offers. The District shall evaluate Proposals as modified by the Best and Final Offer, and on the basis of the Evaluation Criteria.

If a Proposer does not submit a Best and Final Offer or a notice of withdrawal, the Proposer's original proposal shall be construed as its Best and Final Offer.

4.2.4 References

The District reserves the right to investigate references, including customers other than those listed in a Proposer's submission. This inquiry may include without limitation investigation of past performance of any Proposer with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, completion or delivery of a project on schedule, and its lawful payment of employees and subcontractors.

4.3 Notification of Intent to Award

The District shall notify Proposers of its Intent to Award by posting such notification on ORPIN.

4.4 Negotiation

- a) The District reserves the right to negotiate final contract terms with the selected Proposer(s) to the fullest extent allowed by law and as in the best interest of the District.

5 Solicitation Terms and Conditions; Protest of Solicitation or Award

5.1 Solicitation Document

This solicitation document may be viewed at the Portland Public Schools Bid Desk, located at the Blanchard Educational Service District Building, 501 N. Dixon St., Portland Public Schools, 97227.

5.2 Proposer Cost of Response Preparation

Proposers shall bear sole responsibility for all costs incurred in preparing and providing their proposals in response this RFP.

5.3 Submitted Materials are District Property

All material submitted for any portion of a Proposal in response this RFP, or during any tier of this solicitation, shall become the property of the District and will not be returned to Proposers.

5.4 Proposal Validity

Proposals shall remain valid for a period of **120 days** following the Proposal submission deadline.

5.5 Solicitation Cancellation, Rejection of a Proposal or All Proposals

The District may cancel the Procurement or reject any or all Bids in accordance with ORS 279B.100.

The District is not liable to any Proposer for any loss or expense caused by or resulting from the cancellation of a solicitation or rejection of a Proposal.

5.6 Disputes

In case of any doubt or differences of opinions as to:

(a) the items or service to be furnished under this RFP, or

(b) the interpretation of the provisions of the RFP, the decision of the District shall be final and binding upon all parties.

5.7 Publicity

News releases relating to this RFP will not be made without prior approval by, and in coordination with, the District Community Involvement and Public Affairs Department.

5.8 Preference for Recycled Materials

The District shall give preference for Recycled Materials as set forth in ORS 279A.125 if:

a) The Recycled Product is available;

b) The Recycled Product meets applicable standards;

c) The Recycled Product can be substituted for a comparable non-recycled product; and

d) The Recycled Product's costs do not exceed the costs of non-recycled products by more than 5%, or a higher percentage if the District makes such a Written determination.

5.9 Performance within state of public printing, binding and stationary work

(1) Except as provided in subsection (2) of this section, all printing, binding and stationery work, including the manufacture of motor vehicle registration plates and plates required to be affixed to motor carriers, for the state or any county, city, town, port district, school district, or other political subdivision thereof, shall be performed within the state. All requests for bids and all contracts for such work shall so stipulate.

(2) The work referred to in subsection (1) of this section may be performed outside the state if it is established that:

(a) The work cannot be performed within the state;

(b) The lowest price for which such work can be procured within the state exceeds the charge usually and customarily made to private individuals and corporations for work of similar character and quality; or

(c) All bids for the work, or any part thereof, are excessive and not reasonably competitive.

5.10 Confidentiality

The District is subject to the Oregon Public Records Law (ORS 192.410 to 192.505), which requires the District to disclose all records generated or received in the transaction of District business, except as expressly exempted in ORS 192.501, 192.502, or other applicable law. Examples of such exemptions are: trade secrets (ORS 192.501 (2)) and computer programs (ORS 192.501 (15)).

The District will not disclose records submitted by a Proposer that are exempt from disclosure under the Oregon Public Records Law, subject to the following procedures and limitations:

The Proposer shall mark all proposal pages containing the records it has determined as confidential under Oregon Public Records Law and shall segregate those pages in the following manner:

- a) Such pages shall be clearly marked "Confidential" on each page of the confidential document.
- b) Proposer shall separate confidential pages from its other Proposal pages by providing the confidential pages to the District in a separate envelope or package.
- c) In its proposal, Proposer shall cite the specific statutory exemption in Oregon Records Law exempting such pages from disclosure.
- d) Items 5.8 a) or 5.8 b) will prevail in the event these provisions conflict with formatting or response instructions elsewhere in this document.
- e) Proposers may not mark an entire Proposal confidential. Should a proposal be submitted in this manner, the District will hold no portion of the proposal as confidential, unless such a portion is segregated as per 5.8 b) and is determined exempt from Oregon Public Records Law

Notwithstanding the above procedures, the District reserves the right to disclose information that the District determines, in its sole discretion, is not exempt from disclosure or that the District is directed to disclose by the Multnomah County District Attorney or a court of competent jurisdiction.

Prior to disclosing such information, the District will make reasonable attempts to notify the Proposer of the pending disclosure.

5.11 Protests

5.11.1 Protest of Solicitation or Contract Documents

Any Proposer wishing to protest this RFP or any provision or specification herein, must submit such questions, comments or protests to:

Ryan Allen
Phone: 503-916-3804
Fax: 503-916-3109
Email: rallen3@pps.k12.or.us
Portland Public Schools
School District No.1J, Multnomah County, Oregon
Procurement Services Department
501 North Dixon Street, 2nd floor
Portland, OR 97227

The deadline for submitting such protests is: July 11th 2011.

5.11.2 Content of Solicitation Protest

The prospective Proposer's written solicitation protest must include all of the following:

- a) Sufficient information to identify the solicitation that is the subject of the protest;
- b) The grounds that demonstrate how the procurement process is contrary to law or how the solicitation document is unnecessarily restrictive, is legally flawed, or improperly specifies a Brand Name;
- c) Evidence or supporting documentation that supports the grounds on which the protest is based; and
- d) A statement of the desired changes to the Procurement process or the solicitation document that the prospective Proposer believes will remedy the conditions upon which the prospective Proposer based its protest.

5.11.3 Protest of Contract Award

Adversely affected Proposers who wish to protest the Competitive Range, proposal rejection as non-responsive, the Intent to Award a contract may do so, providing:

- a) The Proposer is adversely affected because the Proposer would be eligible to be awarded the contract in the event that the protest were successful; and
- b) The reason for the protest is:
- c) All higher-ranked proposals are non-responsive;
- d) The District has failed to conduct the evaluation of Proposals in accordance with the criteria or processes described in the solicitation materials;
- e) The District has abused its discretion in rejecting the protestor's Proposal as non-responsive or;
- f) The District's evaluation of Proposals or the District's subsequent determination of Award is otherwise in violation of Portland Public Schools Public Contracting Rules or the Public Contracting Code.

An affected Proposer may only protest its exclusion from a tier of competition if the Proposer is responsible, submitted a responsive proposal and, but for the District's mistake in evaluating the Proposer's offer, or other Proposer Offers, the protesting Proposer would have been eligible to participate in the next tier of competition.

1. All appeals must be in writing and physically received by the Director of Procurement no later than 2:00 p.m. on the fifth (5th) working day after the postmarked Notice of Intent to Award or disqualification.

Address appeal to:

APPEAL OF AWARD:RFP NO. 2010-1304

Attn: Director, Procurement and Distribution
Portland Public Schools
School District No.1J, Multnomah County, Oregon
Procurement Services Department
501 North Dixon Street, 2nd floor
Portland, OR 97227

2. Appeals must specify the grounds for the appeal including the specific citation of law, rule, regulation, or procedure upon which the protest is based. The judgment used in scoring by individual evaluators is not grounds for appeal.

3. Appeals not filed within the time specified in paragraph 1 above, or which fail to cite the specific law, rule, regulation, or procedure upon which the appeal is based shall be dismissed. An issue that could have been raised by request for clarification or protest of specifications as provided in Section 5.11.1 is not grounds for appeal.

6 Contract Terms and Conditions

6.1 Contract Award and Term

The District may award multiple contracts as a result of this RFP.

The District will determine the number of contracts to be awarded at the time of contract award.

The contract term will be three years with options to renew for two additional one-year terms.

6.2 Portland Public Schools Contract

Proposers are advised to thoroughly review and familiarize themselves with the District sample standard contract incorporated as Attachment A.

Any contract resulting from this RFP shall be based on the RFP documents and in compliance with Portland Public Schools Public Contracting Rules and the Public Contracting Code.

6.3 Insurance

Proposers are advised to carefully review the insurance requirements contained in the sample standard contract.

6.3.1 Insurance Certificates

Contractor will promptly provide Certificates of Insurance at the District's request.

6.4 Asbestos Abatement

The Contractor or subcontractor is required to possess an asbestos abatement license if required under ORS 468A.710.