**Implementation Services Questionnaire**

Each question should be answered fully and concisely.

1. How many employees are there in your company assigned to implementation services? Briefly describe the organization structure of your company and identify the number of employees in each group.
2. How long has your firm been providing implementation services for student information systems? How long for the proposed SIS?
3. State your firm’s ongoing commitment to existing clientele.

**Implementation Services**

1. How many total employees will be dedicated to providing implementation services for this proposed SIS project? Please describe the number as associated with different areas of expertise. For example: Four project managers, Ten trainers, Five data conversion specialists, etc.
2. How many other implementation projects will your firm be supporting during the SCUSD project timetable, and how many of your employees are already dedicated to those efforts?

## Proposed Approach, Methodology and Project Plan

***For the purposes of answering the questions in this section please keep in mind that the application and database will be locally hosted here at SCUSD. Try to use similar projects as references.***

1. Describe your proposed deployment strategy for implementation of the SIS in all of our schools. Elaborate on the proposed phase-in strategy, if any, and the recommended timeframes for implementation. Would any functionality wait until a subsequent phase? Do you recommend that all users in a district be implemented at once, teachers and school office staff at the same time? Do you propose to run both the old and new systems in parallel for a period of time? How would the information be kept in sync and how would issues relating to student transfers be handled in a mixed system environment? Considering the number of SCUSD schools, what is the expected duration to full implementation starting at contract agreement and ending once the last school is operational?
2. Describe your high level project plan, with major milestones, timelines and deliverables. This plan should include more detail than the phasing description from the prior question. Please indicate the tasks which will be SCUSD responsibility and those which will be the implementation services vendor responsibility.
3. What is the average time it takes to implement the SIS system in all of their schools? Does that average include deployment of the system in all classrooms?

1. In the initial project prior to implementation, do you recommend a pilot of the system in a few schools? Why or why not? In your answer define your use of the term ‘pilot’ (e.g., running both systems in parallel, testing the new, or actually going live on the new system prior to other schools).
2. Many districts find it extremely difficult to implement a new student information system. What approaches have you found cause delays or implementation failures for districts implementing the proposed SIS?
3. Describe one (1) problematic SIS implementation/installation project that your firm was involved with.

* What went wrong?
* How was it resolved?
* How long did it take?
* Was the software available during this time?

1. Describe one of your more complex projects, where the school district, preferably a large school district, had unique and complex requirements. How were these requirements handled in the project?
2. Describe your approach to performing a functional fit analysis (or “fit-gap”) for the SIS.
3. Do you recommend and are you willing to perform a fit-gap analysis prior to final contract approval?
4. Describe the implementation methodology you would use to implement this SIS application.
5. What support will be provided to the districts to help with configuration and design decisions to ensure new business process, the data conversions and system tables are properly aligned with the SIS system and suitable to the district?
6. Describe your approach to performing data conversion from existing applications to the new SIS system. Below are items of interest to SCUSD:

● Recommended conversion periods (any time or only during specific times of school year)

● Specify the work to be performed by your company and work to be performed by SCUSD staff

● Assign the number of hours expected to accomplish each task to be performed by SCUSD

● Should data be converted for one school at a time or can several schools be converted at once?

● Is data conversion a one-time shot or can the process be repeated until the district is satisfied?

● How many years of data does your company recommend is converted to the new SIS?

● Will each year to be converted require a separate conversion process?

● What is your recommendation for handling historical data that is not converted to the new SIS?

● Will your firm agreed to a fixed price for all data conversion? If not, how is the contract structured?

1. Describe your approach to problem identification and resolution.
2. Explain how your firm will mitigate the risk of not meeting project schedules and implementation dates.

**Training Plan**

1. Discuss in detail your firm’s training plan for this project. In cases where you recommend a “train the trainer” model, please describe the experience and skill set of the person(s) who should be trainers, and explain why you think this approach will work. Your approach should address the training needs of:

* Project team
* Principals and administrators
* School office staff
* Teachers and classroom staff
* Central staff in support departments
* Technical staff
* Help desk staff
* Staff to support Ad hoc reporting and queries.

Different strategies may be appropriate for the different types of training which will be needed:

* Project team training
* Technical training for staff who will support the system
* End user training – for school office staff
* End user training – for teachers
* End user training – for central administrators and central staff
* Vendor site training
* Online tutorials, interactive help, knowledge-based systems

SCUSD expects vendor proposals to include all training necessary for staff on the project team and all training necessary for internal staff trainers if a “train the trainer” approach is recommended for any of the groups to be trained. Training costs would relate directly to the vendor’s approach to training, but could include items like development of the training plan, creation of training materials for end user training, and creation of online tutorials for common tasks used by casual users.

1. If a ‘train the trainer’ approach is recommended, what follow-up support will be provided to the trainers to ensure the training program is successful and well received?
2. Describe your firm’s approach to ongoing training and support after the initial project is completed.
3. Do you have any vendor training sites with on going classes? If so, where are they located, and what kinds of classes are offered there?
4. What is the availability of training materials from courses taught by your company’s training program in relation to the use, operation, programming, and etc? Do such training materials include student materials such as syllabi, agendas, tests, and teaching materials such as instructor’s manuals, audio-visual aids, test results, and the like?

**Support Plan**

1. Describe your proposal for supporting users after they have received their initial training and actually begin to use the new system.

* Describe the support plan in some detail, i.e., central support, site level support, third party support.
* How many SCUSD staff should be deployed at the Help Desk to support the new SIS?
* Would there be use of remote support software?
* Detail the number of your employees that will be working on-site at the SCUSD to help with the initial roll-out of the new SIS. Describe the type of support they will be providing.
* How many resources will it take to provide this on-site support?
* What consulting resources will be provided to SCUSD for end-user support during this time?

1. What experiences do you have working with state user’s groups; e.g. CSIS, CDE, etc?
2. Do you currently host a conference in the Northern California region, or nationally?
3. Describe your proposal for supporting our internal technical staff with system configuration, day to day maintenance, plus extending the capabilities of the SIS application through utilities and software tools. Our technical staff might need to perform database administration, system operational functions, and programming.

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**Implementation Services - Satisfaction of Current Clientele**

1. Provide information on projects your firm has carried out demonstrating capabilities to perform this work. Describe two (2) similar SIS implementation projects, the size of the project team, roles of each member, which members were from customer staff and which members were from your firm, the project dates and major deliverables, and the most significant positive and negative factors in the project.
2. Provide the names, addresses and phone numbers of key individuals in the reference sites listed in the above question.

**Qualification and Experience of Individuals Assigned to the Project**

#### Training Team

1. Identify each of your staff members who will provide training services for this project including preparing the training program and training materials and providing actual classes. Describe each person’s role and their experience providing these services on other SIS projects.
2. Provide references for each consultant assigned to this project to provide services.

#### Project Team

1. Identify consultant/company staff team members who will work on this implementation. Describe their experience level particularly in relation to implementation of SIS in K-12 education. Will the team member be working on site at the SCUSD? Is the team member local or traveling? Include a detailed resume for the assigned project manager and a one (1) page resume for all other people to be assigned to the student system implementation. Include a minimum of five (5) resumes, one of which must be a project manager. (Place the resumes at the back of this section.)
2. Describe how your firm will deal with changes in project personnel from proposal through implementation.
3. Are the consulting project team members employees of the firm? If not, in what capacity are they working?

###### Project Manager

1. Do you propose to put a project manager from your firm on this project? If so, what will be their dedication factor (i.e. full-time, half-time, etc)? Will the project manager be working on site at the SCUSD?
2. What are the exact responsibilities of the consulting Project Manager? How will this person’s role differ from the roles of a SCUSD Project Manager and SCUSD Technical Manager?
3. Describe the experience level of the Project Manager assigned to this project. What is their experience in systems analysis, design, installation, and implementation of student information systems and the proposed SIS?
4. Describe the Project Manager’s recent experience in implementations of the specific application software that is being proposed. Note the size (small, medium, large) of school districts in which the Project Manager has implemented the proposed SIS.

## Working with Internal Staff

1. Describe the internal SCUSD staff that will be needed for each phase of the project, their role on the project, the skills and experience they would need to have, and the amount of time needed on the project.

## Contract and Work Plan for Services

1. In contracts with other customers, has your firm agreed to fixed prices for implementation services? If so, describe the process of developing a work plan and defining deliverables which will be tied to contract payments. If not, how is the contract structured to cover vendor services?

**Differentiators**

1. What differentiates your firm from your competitors regarding the implementation of this SIS software application?