Office of Superintendent of Schools   March 30, 2005
Board Meeting of April 13, 2005

Business Operations
Ofelia San Pedro, Deputy Superintendent

SUBJECT: **AUTHORIZATION TO ENTER INTO A CONTRACTUAL SERVICES AGREEMENT BETWEEN THE SCHOOL BOARD OF MIAMI-DADE COUNTY, FLORIDA, AND ANTON SYSTEMS, INC., PURSUANT TO REQUEST FOR PROPOSALS NO. 108-DD10 – HELP DESK SOFTWARE PROJECT 2004 – 2005**

COMMITTEE: **INNOVATION, EFFICIENCY & GOVERNMENTAL RELATIONS**

The District currently has an aging Help Desk application, which is used for tracking IT systems and telecommunications problems. This system has been effective for providing basic support to the District's administrative offices and limited support for the District's schools, but is no longer capable of meeting the emerging demands of direct support to the schools and streamlined business processes. For this reason, a replacement solution was listed as one of the foundation projects in the IT Strategic Plan that was approved by the School Board in January of 2004.

Limitations of the current system include:

- Inability to reach into the classroom; not scalable to other departments
- No web-based access
- Legacy client server application
- No longer supported by the vendor
- Not enough licenses for existing school and non-school site computer technicians
- Additional licenses for the minimum number of instructional and non-instructional users would cost $600,000 more than the proposed solution
- Ineffective reporting and analysis capability

E-143

Benefits of the proposed solution:

- Allows other departments to receive requests for assistance; it will be available to the entire District. Examples of such use include:

  - Teachers can request hardware repairs and software support from their desktops, and tickets can be monitored to be sure that their classroom needs are met;
  - Risk Management and Benefits and Compensation will be able to track questions and requests regarding open enrollment, dependent coverage, and costs;
  - Food Service will be able to receive requests from school cafeteria managers concerning their Food Service Ordering Systems, Point of Sales Systems, and issues regarding cafeteria operations;
  - Attendance Services, Foreign Records, Student Transfers and FTE Office can replace manual systems for keeping track of important student information requests;
  - Regional Centers can receive and track requests from schools regarding District initiatives, programs, and school operation procedures;
  - Public Information will be able to track requests;
  - Transportation will be able to monitor community complaints and follow-up;
  - Maintenance will be able to respond to questions from principals and non-instructional staff concerning facility-related issues;
  - Community Affairs staff will be able to receive and track questions regarding community activities, the volunteer program, and other related activities.
- Provides immediate answers for end-users using a Knowledge database with 24/7 hour access for Gradebook, Student Performance Indicators (SPI), Web Interface for Special Educators (WISE), E-mail and other applications for the departments listed above.

Benefits specific to the Information Technology Service Center include:
- Notifies end-users of system availability and allows them to track trouble tickets and service requests online
- Provides built-in prompts for Help Desk agents, resulting in up to 30% improvement in resolution time
- Decreases hold time to reach a Help Desk agent
- Identifies problem root cause to reduce incidents
- Enables staff resource leveling of school-based technicians
- Identifies failure patterns resulting in reduced service repair costs

On June 16, 2004, the School Board approved a request to submit a Request For Proposals (RFP) for a Service Desk solution. The RFP was structured to provide the District with an enterprise level, perpetual license, providing cost-effective delivery to all schools, Region Centers and other organizational units and to interface with District information systems and data warehouses.

Request For Proposals No. 108-DD10 – Help Desk Software Project 2004-2005, opened on August 26, 2004, will provide a district-wide Service Desk Software solution to streamline Service Desk operations, provide support for school sites and other organizational units, and provide increased functionality for all District end-users. Twelve vendors responded to this advertised proposal.

The selection committee met to evaluate proposals received in response to the Request For Proposals on September 16, 2004, and September 20, 2004. A motion was passed after significant discussion to recommend that six vendors be invited to participate in oral presentations. On October 4 and October 5, 2004, the selection committee met to hear presentations from the six vendors. Based upon proposals submitted and oral presentations, the committee selected three vendors to participate in a proof of concept testing process. From November 10, 2004, to January 14, 2005, the selection committee members, using District servers to determine product compatibility with District infrastructure, conducted proof of concept testing, in compliance with requirements stated in the Request For Proposals.

A final meeting of the selection committee was held on January 18, 2005. Based upon proposals submitted, oral presentations and the proof of concept testing process, the committee chose to recommend Anton Systems, Inc., to provide a district-wide Service Desk program, to the District. Anton Systems, Inc. will implement the HEAT® product suite, a comprehensive Service Management solution and provide customization to meet the needs of the District.

The recommendation below reflects a request to authorize a contract with Anton Systems, Inc., in an amount not to exceed $1,450,000 for the Help Desk Software. In addition, $450,000 will be used for support, training, and consultants for implementation of the product.

The recommendation authorizes a change to the General Obligation Bond fund, in the amount of $1,900,000, to fund the contract with Anton Systems, Inc. and required implementation expense.

Fund Source
General Obligation Bond

M/WBE Eligibility
None

RECOMMENDED: That The School Board of Miami-Dade County, Florida, **AUTHORIZE** the Superintendent to enter into a contractual services agreement between The School Board of Miami-Dade County, Florida, and Anton Systems, Inc., pursuant to Request For Proposals No. 108-DD10 - HELP DESK SOFTWARE PROJECT 2004-2005, effective April 13, 2005, as follows:

1.   ANTON SYSTEMS, INC.
       13650 N.W. 8 STREET, SUITE 103
       SUNRISE, FL 33325
       OWNER: MICHAEL ANTONELLI, PRESIDENT

       Highest Rated Proposal

2.   Authorize Procurement Management Services to enter into a contract with Anton Systems, Inc. not to exceed $1,450,000.

3.   Authorize Information Technology Services to disburse up to $450,000 for support, training, and implementation of the software.

4.   Authorize changes to the Facilities Five-Year Work Program to fund this project from central contingency in the General Obligation Bond fund and establish program 0911 – Technology Enhancements in the amount of $1,900,000.

OSP/lja

Information Technology Services

Project Scope Document
P3842000

"We will assume no changes unless we hear from you by 03/03/05."

Project Title:	Service Center Software
Bureau:	Communications
Team(s):	Support Services
Prepared By:	Janis Taylor
Initial Publication Date:	March 1, 2005

Alignment to District Goal:

	(Place an X in box to the left of the goal or goals which the project addresses) - double click on the excel object to launch.
	Ensure achievement of high academic standards by all students.
	Develop our students so that they are able to successfully compete in the global economy.
	Actively engage family and community members to become partners in raising and maintaining high student achievement.
X	Reform business practices to ensure efficiency, effectiveness and high ethical standards.
	Recruit, develop and retain high-performing, diverse and motivated faculty and staff.

Table of Contents

REVISIONS HISTORY

All revisions to this document must be approved and agreed upon by all stakeholders. It is understood that changes to the original document may affect the completion date of the project.

Date (mm/dd/yy)	Version	Author	Description
2/28/05	1.0	Janis Taylor	Initial release of scope document post RFP vendor choice.

Information Technology Services
Miami-Dade County Public Schools

Service Center Software

Project Stakeholders

Name: Type in alpha order (last name, first name) - *denotes a mandatory stakeholder	Department/Team
Alberghene, Steve	Program Mgmt. / Process Engineering
Avila, Rolando	Network Expansion Services (NES)
Clark, Arnold*	Program Mgmt. / Process Engineering, PMO
Diaz, Sylvia	Instructional Technology
Diliello, Nicholas	Systems and Programming
Diorio, Victor	WATS
Duenas, Nelson	Facilities Operations
Ferris, David	Contract & Financial Services
Garcia, Ruben	Maintenance
Graper, Debbie	Support Services
Karcher, Deborah*	Information Technology Services
Leyva, Marta	Attendance Services
Marinelli, Carmen	Region II
Novo, Rosa	Risk/Benefits Management
Perez, Javier	Network Expansion Services (NES)
Rinehart, Craig	Business Operations Services
Rodriguez, Juan F.	Network Services
Rohm, Terry*	Program Mgmt. / Process Engineering
San Pedro, Ofelia	Business Operations
Sims, Tom	Network Services
Spence, Joseph	Data Security
Young, Beverly	Support Services
Zambrano, Michael	Support Services

Project Summary

Problem Summary

The District currently has an aging Help Desk application which is used for tracking IT systems and telecommunications problems within the District. This system has been effective for providing basic support to the District's Administrative offices and limited support for the District's schools, but is no longer capable of meeting the emerging demands of direct support to the schools and streamlined business processes.

Another limitation is that the existing system cannot be adapted to extend its functionality beyond the IT support. For example, the current application cannot be adapted for customer support in other areas such as Human Resources, various educational programs, school maintenance, etc.

Furthermore, the current system does not have enough licenses to enable everyone to access the current system. Providing these additional licenses, without upgrading the functionality of the solution, would cost over $600,000 more than the proposed solution. In addition, the current application is no longer supported by the vendor. The District would have to use its own programmers to make required changes.

Information Technology Services recommends replacing the existing non-supported legacy system with one that truly enables the District to streamline its business processes and improve communications and support for the schools.

Goal

Procure and implement a new District-wide Service Desk application to drive future business process streamlining efforts and ensure the reliability and accessibility to school-based applications such as the new Gradebook application, District-wide Email, Student Performance Indicators (SPI), Web Interface for Special Education (WISE), etc. on a 24x7 basis.

Objectives

Replace current Help Desk application with a solution that provides:

- The ability to create web based Service Requests.
- Self-Help capability through an integrated Knowledge Base.
- Remote support capability.
- The means to prevent problems before they happen.
- Access any time, anywhere using wireless, Internet-based technology.
- Improve Change Management to prevent miscommunication and flawed deployments.
- Integrated Asset management.

Scope

- Initiate RFP process and choose a vendor.
- Define business processes to ensure the product adequately meets the needs of the District.
- Align ITS business processes with service management best practices.
- Provide seamless data integration between the District's other information systems.
- Develop a roll-out plan with stakeholders to ensure that the product integration is successful.
- Purchase product with "Proof of Technology" clause built into the purchase order.
- Training for System Administrators, Call Center Agents and end-users.
- Pilot implementation and review.
- Phased implementation throughout the District.

Deliverables

- Select product using the District RFP procedure.
- Full suite of software necessary to record and manage service requests through their resolution.
- Integrated asset, remote access, and change management capability.
- Integrated knowledgebase to assist technicians in finding solutions to problems more quickly.
- Self help capability for the entire District.
- Re-engineered IT support and processes.
- Re-engineered business processes for areas such as Attendance Services, Compensation and Benefits, Risk Management to effectively use this new application to streamline business processes.

Risks

1. Excessive cost of product based on number of potential users and software licensing structure.

   Mitigation

   Current budget request factors sufficient concurrent licenses for use by the entire District.
   Negotiate an enterprise-wide license which would be more cost effective relative to individual user concurrent license structure.

2. Implementation date not met due to user dissatisfaction uncovered during pilot evaluation or loss of product credibility.

   Mitigation:

   Include representatives from all potential user groups in all phases of project to ensure product complies with defined work flow requirements.
   Utilize Proof of Concept methodology within the RFP process

3. Higher impact on network than anticipated.

   Mitigation:

   Specifications will include bandwidth and network infrastructure considerations.
   Measurements will be made during the pilot of project bandwidth usage.

4. Cultural resistance to start using the E-ticket reporting system, Knowledge Base and Agent Scripting components.

   Mitigation:

   Reward clients who open tickets via the web by giving their tickets slightly higher priority for initial Call Center Contact.
   Publicize and promote the new system via the M-DCPS website, e-mail and verbal notification from Call Center Agents and Technicians.
   Evaluate wait and response time metrics and publicize the results.
   Recognize organizational unit or school site that opens the highest percentage of E-tickets (as opposed to phone calls) on a monthly basis.
   Involve Call Center Agents in creating scripts and Knowledge Base entries to ensure familiarity, usability and buy-in.

Risks (continued)

5. Negative impact on Service Center response time when dual system input is required during implementation phase.

   Mitigation:
   Increase staff by use of additional part-time ITS personnel or hire temporary hourly data input specialists.
   Encourage buy-in from Call center staff by informing them in advance of implementation procedure.

6. Inherent limitations of mainframe applications may prevent data from being used by Service Center solution.

   Mitigation:
   Manage stakeholder expectations; ensure all potential users are aware that Asset Information in the PROP (Property) system may not be usable in the current format.
   Develop new standards for Asset Tracking using desktop discovery that integrates with the chosen solution.
   Link Property Control number to workstations by changing workstation naming convention so that property information is available during automated desktop discovery.

7. Lack of clearly defined requirements from all departments who will be using the product.

   Mitigation:
   Solicit suggestions and requirements from each organizational unit that will be using the product.
   Include representatives from all potential user groups in District Review Committee and Proof of Concept testing.
   Utilize proper requirements capture and development using industry best practices.

8. Standard risk related question for all projects "What is the impact if the project does not proceed?

   The current solution is outdated and no longer supported by the manufacturer. The cost to buy more licenses would exceed $3,000,000 which does not include upgrading the software. As it is used today, the current solution does not support a Knowledge Base, web based access, integrated desktop discovery, wireless remote access, call scripting for agents, one-click historical analysis, asset tracking or change management. The proposed solution would cost less and provide all of the preceding functionality.

Estimated Initial Cost Analysis (project costs incurred prior to system being placed into production)

Description	Number of Units	Type of Unit	Price per Unit		Estimated Cost
Labor Costs (Indirect/ District Staff):					
Project Planning	100	Hours	$	40	$4,000
Meetings	400	Hours	$	40	$16,000
Determining Measures of Success	80	Hours	$	40	$3,200
Project Scope Document	10	Hours	$	40	$400
Project Requirements Document	25	Hours	$	40	$1,000
Project Plan Document	20	Hours	$	40	$800
Acquiring Product	480	Hours	$	40	$19,200
Development/Modifications	500	Hours	$	40	$20,000
Testing	150	Hours	$	40	$6,000
User Documentation	50	Hours	$	40	$2,000
System Documentation	40	Hours	$	40	$1,600
Training (System Administrators)	32	Hours	$	40	$1,280
Training (Call Center Agents & End-users)	120	Hours	$	40	$4,800
Implementation (HW config. & Prod. Source)	150	Hours	$	40	$6,000
Pilot Support (Prob. Resolve & Fine Tuning)	80	Hours	$	40	$3,200
Pilot Review / Feedback / Post Pilot Changes	120	Hours	$	40	$4,800
Success Measures (Pilot Group)	80	Hours	$	40	$3,200
Project Closure & Lessons Learned	20	Hours	$	40	$800
Total:	2,457	Hours	$	40	$98,280
Hardware/Software (Direct/Vendor):					
Hardware	50,000	1			$50,000
License fees and Installation	1,436,150	1			$1,436,150
2 Contract Business Analysts	163,924	1			$163,924
Project Manager for one year	95,447	1			$95,447
Training Costs	73,700	1			$73,700
Total Direct:					$1,819,221
Indirect:					$98,280
Grand Total:					$1,917,501

Proposed delivery date: (enter date here in format day/month/year (XX)

Notes: Vendor software pricing is based on cost per license. Volume discounts or site licensing could reduce costs.

Assumptions

The software solution will fulfill the needs of all school sites and departments.
Clients will use the product as designed; are willing to open E-Tickets via the web and use the self-help tools and Knowledge Base.
Service Center Agents will use the scripting and detail screens as designed.
Intended users have access to PCs with Internet capability.
Executive sponsorship will continue throughout the project lifecycle.
A team will be assembled to support and manage the project.

Benefits – Qualitative Benefits/Direct

- Greater customer satisfaction resulting from self service, abandoned calls, or reduced hold times when calling
- Decrease of calls to the Call Center
- Higher first call resolution resulting in shorter down time and an increase in customer confidence in the Call Center's ability to solve their problems
- Greater efficiency in utilizing the Agents' time
- Enhanced reporting of trends and analysis
- Shorter training time required for new staff due to integrated scripting and detail screens
- Shorter ramp-up time for all Agents when new applications are added to the support menu
- A substantial decrease of calls sent to Tier 2 (Network Support); up to 30%
- An accurate accounting of work orders performed by Field Technicians; the "drive by" fixes all techs perform when visiting a site
- Decrease in calls referred to the field due to one-click historical analysis and integrated desktop discovery tools for all Call Center Agents
- Decrease in time spent on misrouted calls, such as change requests which are sent to Tier 2 before client is referred to AMC (Adds, Moves, Changes) website
- Increased efficiency and availability of metrics for call tracking, incident reporting and change requests at the school or departmental level.

Return on Investment (ROI) / Payback Period

	Initial Costs	Year 1	Year 2	Year 3	Totals	
Technology - One-time	$1,486,150				$1,486,150	
Personnel - One-time	$357,651				$357,651	
Operations & Processes - One-time	$73,700				$73,700	25%
Total Costs	$1,917,501				$1,917,501	

Cost Savings (hard)	Initial Costs	Year 1	Year 2	Year 3	Totals	
Technology - One-time (Peregrine licenses)		$2,400,000			$2,400,000	
Technology - Ongoing						
Personnel - One-time						
Personnel - Ongoing						
Operations & Processes - One-time						
Operations & Processes - Ongoing						
Total Offsets		$2,400,000			$2,400,000	

note - insert costs by year per category, same for cost savings, cost savings start when system goes into production.

Manually Enter Payback Period Estimate Here (in years & months e.g. 1.5 years) | Immediate

Due to Peregrine help desk software license structure and license renewal timing $2.4M of out of pocket vendor expense can be avoided.

Total Cost of Ownership (TCO)

Total Cost of Ownership Template	*(use 3 year time horizon unless application forecasted useful life is definitely longer)*				
Incurred Costs	Initial Costs	Year 1	Year 2	Year 3	Grand Totals
Technology - One time	$1,486,150				$1,486,150
Technology - Ongoing			$181,980	$181,980	$363,960
Personnel - One-time	$357,651				$357,651
Personnel - Ongoing					
Operations & Processes - One-time	$73,700				$73,700
Operations & Processes - Ongoing					
Total Costs	$1,917,501		$181,980	$181,980	$2,281,461

$181,980 is the maintenance / software license fee after year 1 from the vendor.

Success Measurement

Project delivered on time and on budget
Survey of users six months after implementation to confirm satisfaction with product
Improvement in Call Center metrics: decrease of call hold time and abandonment rate
Verification of acceptance by users: trouble tickets and service requests entered via the web

References

RFP: http://procurement.dadeschools.net/bidsol/pdf/bids/108dd10.pdf

Non-ITS stakeholders can view project summary data at: http://projecttracking.dadeschools.net based on the project ID which is P3842000.

Acronyms / Glossary

AMC (Adds, Moves and Changes) – Term commonly used in a technology environment to describe when users move phones, personal computers, or other technology devices and how those user changes are managed.

DRC (District Review Committee) - Committee comprised of a cross section of District employees as part of the RFP process. This committee, in collaboration with Procurement develops the RFP language and evaluates vendor solutions.

PMBOK™ (Project Management Book of Knowledge) – The Project Management Institute's Guide to the Project Management Body of Knowledge publication. It describes the sum of knowledge within the profession of project management and defines standards for managing projects.

RFP (Request for Proposal) - Announcements that specify services to be provided, product to be delivered, and appropriate vendors sought. Proposals submitted in response to RFPs generally result in the award of a contract. The District has a specific RFP procedure.

Document Definitions

Bureau	Business, Communications, Education, Financial, Personnel
Estimated Cost Analysis	
Price per Unit	This cost should be based on type of staff involvement.

Technicians	$40.00
S & P staff	$40.00
Support staff	$24.00
Trainers	$40.00

P########	Project Account Code from Project Accounting System
Revisions History	All revisions to this document must be approved and agreed upon by all stakeholders. It is understood that changes to the original document may affect the completion date of the project.
Author	Creator of initial document or changes to the document
Date	Initiation or change date
Description	"Initial" or what was changed
Version	1.0, 2.0, etc.
Stakeholders	People involved in or affected by project activities

Procedures

1. Provide all stakeholders with a copy of the Project Scope Document.
2. Make the revisions to the Project Scope Document that were agreed upon and E-mail the Revised Project Scope Document to the stakeholders prior to the formal scope document review meeting.
3. Request a "Read Receipt" for the E-mail.
4. Ensure versioning is enabled in Xythos for the scope document.
5. Include the following statement in bold on the cover page of the original and Revised Project Scope Documents and at the end of the E-mail message used to deliver the document to the stakeholders:

"We will assume no changes unless we hear from you by mm/dd/yy."