WCPS | Washington County Public Schools

Information Technology Service Management (ITSM)

RFP 2023-24

ATTACHMENT A: RFP FORMS

Table of Contents

1.0   Instructions

Responses:

This vendor response questionnaire will be used to evaluate the functionality of the vendor's offering and its ability to meet the needs of WCPS. It is imperative that vendors provide full and accurate responses to the questions below so that the WCPS evaluation team can have a full understanding of the capabilities of the vendor's product. Vendors' responses will be verified during the interview and platform demonstration. It is also assumed that the vendor will provide full proof of the capabilities declared in this questionnaire. Failure by a vendor to provide honest responses will be grounds for disqualification from the RFP process. The WCPS evaluation committee will make the final determination of the score for each response based on the rating criteria below.

Rating Criteria:

0 — Functionality not provided: Not included in the proposed IT Service Management Platform.

1 — Minimal functionality provided out of the box: The vendor provides the functionality in a minimal way. No additional product, customization, or work-around can provide the full functionality.

2 — Partial functionality provided out of the box; however, it does not fully satisfy the requirement. Additional functionality may be provided using an additional product, customization, or work-around.

3 — Significant functionality provided out of the box; however, minor aspects of the requirement are not satisfied. Full functionality can be provided using an additional product, customization, or work-around.

4 — Full functionality provided out of the box. The vendor provides the functionality from its own code base. No additional product, customization, or work-around is required.

2.0 Pricing

All pricing should include all costs for the platform to meet all finalized requirements, including any licensing, hosting fees, support and maintenance fees, setup, installation, and configuration fees, etc.

If the pricing model includes costs based on the number of service agent users, end users, inventory items, etc. those costs should be detailed on a per-license basis, along with any quantity discounts, and if an "unlimited" option is available the pricing for the "unlimited" option should also be included in the proposal.

If the platform allows for the licensing of specific modules the pricing should include information on the cost to license each module, as well as any bundling discounts available

If paid training options are available for administrators and/or service agent users the pricing should include information on the cost for that training, as well as any training included in the base price

If there are multiple support options available, the pricing should detail the various tiers of support available and the costs for each

Include any other miscellaneous costs to implement the solution in order to meet the finalized requirements

Pricing should be guaranteed for the proposed initial two-year length of the contract. If pricing will change for the optional two-year renewal periods those changes should be detailed in the proposal. Pricing will be evaluated on the full six-year term.

3.0 Requirements and Functionality

Rating Types:

R – These questions address a feature or functionality that is required for the system to meet the minimum functionality requirements of WCPS. Systems that do not sufficiently address these items will not be considered by WCPS

O – These questions address a feature or functionality that is optional. WCPS may choose to exclude any or all optional features and functionalities from the evaluation, if it does so then the items excluded will be excluded for all vendors in order to make a fair comparison. If WCPS chooses to include an optional requirement, then vendors who do not offer that feature will receive a 0 score for that Req ID.

A – These questions request additional information on the product in order to assist WCPS in evaluating the vendor's capabilities, and the product. If they relate to optional functionality that WCPS chooses to exclude from the evaluation then the additional information related to that optional functionality will also be excluded from the evaluation.

Vendor Responses:

Vendors shall Copy the Req ID, Type, and Product and System Information to a Word Document and provide a Vendor Response to each Req ID. *__Vendors shall print a hard copy out to submit with their proposal and the file shall be saved as a Word Document on the Electronic Version submitted on a USB Flash Drive__*.

Req ID	Type	Product and System Information
1.1	A	Describe the history of your IT Service Management tool offerings, including the Initial Release Date and Development Roadmap items for the next 3 years
1.2	A	Describe third-party software packages that are required for your IT service management tool to function correctly (for example, application servers, Web servers, business intelligence (BI), databases, agents or clients for backup, or software distribution and security.
1.3	R	Describe the hosting model of your IT Service Management platform (on-premise or cloud-based, cloud platform used, etc.)
1.4	A	Describe the client model of your IT Service Management platform as used by service agents and end users (web-based, installed application, etc.)
1.5	R	Describe any inventory agents used to collect hardware, software, and user information from various devices
1.6	A	Describe the Schedule and process for updating the environment (either hosted or on-premises) and any installed software that is part of your platform
1.7	O	Detail any additional languages supported by the interface to your platform, as well as any translation functionality provided
1.8	O	Detail any functionality your platform provides to store and track IT Contracts (service, support, maintenance, etc.) and provide alerts on upcoming expirations
1.9	O	Detail any functionality your platform provides to link maintenance contracts to specific devices or hardware and alert on devices whose maintenance contract is pending expiration

Req ID	Type	
1.10	O	Detail any functionality your platform provides to generate invoices for chargeable services
Req ID	**Type**	**Security**
2.1	R	Describe your security model including protection for data in motion, data at rest, and if your solution is multi-tenant how tenants are isolated from one another. Please include information on any audit certifications you have received
2.2	R	Describe the methods of Single Sign On you support for user network credentials, including any differences between how service agents and end users would sign on to the system
2.3	O	Describe the functionality of your system for stand-alone users who are not part of the authentication system (third-party vendors etc.)
2.4	A	Describe your security practices regarding security incident management and data compromise/breach notification procedures.
Req ID		**Technical**
3.1	A	Provide details on any functionality of your ITSM solution that is dependent on a device's operating system
3.2	A	Provide details on the minimum hardware requirements for any system components
3.3	A	Describe any archiving of records the system performs (Are incidents archived after a certain time etc.?) If the system implements some form of archiving functionality, what functionality exists to view, search, report on, and otherwise access archived records
3.4	R	Describe the user and group security model of the solution. What different levels of access are available by default or through configuration?
3.5	O	Describe the methods of accessing the data stored in the solution (web-based exports, APIs, direct database access, etc.)
3.6	A	Please provide any document and diagram describing logical architecture of the application proposed. Please name all components such as workflow, transaction and reporting, and interfaces between components.

Req ID	Type	Training, Services, and Support
4.1	A	Describe your professional services during implementation including workshops, best practice reviews, and documentation.
4.2	A	Describe your administration training
4.3	A	Describe your service agent training
4.4	A	Describe the available support options. Include a description of the support center, staffing levels, and escalation procedures.
4.5	R	Describe your service level agreements, and the associated penalties/rebates, etc. in the event the solution is down or otherwise not functional

Req ID	Type	Incident Management
5.1	R	Describe the process for the creation, modification, resolution, and closure OR cancellation of incident records.
5.2	O	Describe any functionality that allows for the creation of different workflows (with different subtasks) for different types of requests.
5.3	O	Describe any functionality that allows for the automatic sending, receiving, and logging of approvals for requests. Does the system allow end users as well as service agent users to participate in the approval process? What functionality exists to allow for the automated process to be overridden?
5.4	R	Describe any functionality the system provides to send updates via e-mail to requesters and service agent users regarding updates to their incidents, including resolution
5.5	R	Describe any functionality that allows for limiting the accessibility (viewing, creating, and editing) of incidents to specific authorized requestors. (Ex. Users in the "School Tech Coordinator" role can see all incidents where someone from their location is the requestor)
5.6	O	Describe any functionality that documents historical incident data and related information, including incident audit logs, etc.
5.7	R	Describe any functionality that allows for the categorization of incidents, including having multiple tiers of categories or a category tree (Tier 1 Category Hardware, Tier 2 Monitor, Keyboard, Mouse, etc.)
5.8	R	Describe any functionality that allows for a priority to be associated with incidents, and to customize available ticket priorities
5.9	O	Describe any functionality that automates the prioritization, assignment, and escalation of Incidents based on multiple tiers of categories, user group, date/time (calendar routing), requester location, and other ticket properties
5.10	O	Describe any incident workflow functionality to allow multiple steps required for the resolution to be completed by different service agents. (e.g., A new user incident is submitted and Agent 1 Sets up a new user's AD account, Agent 2 provides them with a laptop, and Agent 3 sets up their account in an application)

5.11	R	Provide details on the data that can be included in incident descriptions, updates, and resolutions (e.g., free text, screen captures, and file attachments)
5.12	O	Describe any functionality to define internal SLAs and link incidents to those SLAs either automatically or manually
5.13	O	Describe any functionality that allows SLAs or other response timers to be based on internally defined business hours, to be paused or put on hold, as well as any security permissions available to limit access to this functionality
5.14	O	Describe any functionality that provides for alerting about incidents that exceed or will soon exceed SLA or Priority parameters, as well as hierarchal notification/escalation if the parameters continue not to be met
5.15	O	Describe any functionality that allows service agents to see a countdown timer for the remaining allowed response time (associated with priority or SLA)
5.16	R	Describe any functionality that allows one person to initiate a ticket on behalf of someone else (i.e., list the requestor as different than the author) (e.g., a Helpdesk technician creates an incident for a user who has called the helpdesk, and the caller is listed as the requester)
5.17	O	Describe any functionality related to Incident Ticket Templates
5.18	R	Describe any functionality that allows for custom fields to be added to ticket templates and what methods of data entry are supported for those custom fields (e.g., required/optional, free text, dropdowns, etc.), as well as any options to prepopulate those fields (e.g., with devices assigned to the requester)
5.19	R	Describe any functionality that allows for incident tickets to be linked (e.g., in the case of multiple tickets with a common root cause) and/or merged (e.g., in the case of duplicate tickets)
5.20	O	Describe any functionality that allows for updating, deleting, closing, or otherwise modifying multiple incident tickets at the same time
5.21	O	Describe any functionality that allows for the automated creation of preventative maintenance tickets or other scheduled tasks, as well as any associated alerting of service agent users that these tickets have been created and assigned
5.22	O	Describe any remote desktop control functionality that is integrated with the incident management system
5.23	O	Describe any functionality that allows for ticket reminders to be set to alert a service agent user after a certain time period has elapsed, or when a certain calendar date is reached (e.g., deactivate a temporary account or pickup loaner device)
5.24	O	Describe any functionality that allows information from an incident resolution to populate a knowledge base to facilitate self-resolution
5.25	O	Describe any functionality that allows service agent users to customize the alerts they receive based on incident details

5.26	O	Describe any functionality that provides for Collision detection (i.e., notification that another service agent user is viewing/responding to an incident ticket)
5.27	O	Describe any functionality that allows for the generation of a scannable barcode or QR code that links to the incident ticket (e.g., printed incident ticket that can be attached to a piece of hardware and then scanned by the service agent user installing the hardware to access the associated ticket requesting the install)

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Req ID	Type	Mobile Feature
6.1	R	Provide information on any mobile-compatible app for incident entry and administration, including supported operating systems (iOS, Android, iPadOS, ChromeOS, etc.) and functionality available via the mobile app
6.2	O	Provide any information on GPS or another location tracking of technicians and how this information can be utilized (e.g., to locate the closest resource to facilitate faster response/resolution)
6.3	O	Describe how alerting via the mobile app differs from alerting through desktop clients and/or email. Does mobile alerting support configuration independent of desktop alerting configuration?

Req ID		Change Management
7.1	R	Describe your platform's functionality regarding change management
7.2	A	Describe how your platform addresses change management workflows, including both the approval process and the implementation of the change.
7.3	O	Describe any functionality your platform provides to create and use templates for change management purposes.
7.4	R	What fields are available within the change management module, include information on the ability to create custom fields and to make fields required or optional
7.5	A	Describe how your platform addresses the documentation of the change plan as well as any related backout plan, and what functionality it has for documenting actual work done as a part of the change
7.6	O	Describe any functionality that allows for changes to be linked or otherwise associated with other changes, incidents, inventory items, and any other modules

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Req ID	Type	Knowledge Base
8.1	O	Describe any knowledge base or similar functionality that your platform has, including any functionality that allows for the display of possibly relevant solutions as end users are creating an incident ticket
8.2	A	Describe any functionality that your platform provides to enable administrators and/or service agents to adjust the weighting, relevancy, or other related parameters of knowledge base items
8.3	O	Describe any functionality that your platform provides to allow service agent users to insert knowledge base articles or related information into an incident
8.4	O	Describe any functionality within the knowledge base system that provides for role-based visibility etc. (e.g., Solutions that an end user can implement on their own being visible to end users, while solutions that require elevated privileges that a service agent would have are only visible to service agents not end users)
8.5	O	Describe any functionality that allows knowledge base articles to be created, either on an ad hoc basis or from other platform modules, such as incidents or changes
8.6	O	Describe any functionality that allows for an approval process or related workflow before knowledge base articles are published
8.7	A	Describe the methods that your platform provides to search the knowledge base
8.8	O	Describe any functionality that allows users to provide feedback on knowledge base articles (e.g., correctness, applicability to issue, etc.) Ability to allow user feedback to rate/score content for usefulness related to the inquiry
8.9	O	Describe any automated chat functionality or other automated agent functionality that your platform provides to guide users to possible solutions to their problems

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Req ID	Type	Inventory
9.1	R	Describe the inventory management functionality provided by your system including the types of assets that the system can maintain inventory data (e.g., Windows PCs, Macs, network equipment, etc.) Please detail how inventory information can be collected from these devices and what data can be collected and/or entered (e.g., hostname, make, model, serial number, hard drive, memory, installed software, warranty, lease end dates, etc.)
9.2	O	Describe any functionality provided by your platform to track changes to inventory information collected on an item and provide a history. (e.g., Newly installed software, hardware components added/removed, user logged into device at time of inventory, etc.)
9.3	R	Describe any functionality provided by your platform to allow inventory items to be linked/associated with users, changes, incidents, etc. As well as any automation of this functionality (e.g., assigning computer to logged-in user's user record)
9.4	O	Describe any functionality provided by your platform to track spare equipment, parts, and supplies, including functionality to track this inventory based on location, and to generate alerts when inventory reaches thresholds
9.5	O	Describe any functionality provided by your platform to report and alert on inventoried equipment with approaching warranty expiration dates
9.6	O	Describe any functionality provided by your platform to report or alert on software versions/patch levels of inventoried equipment

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Req ID	Type	Integration
10.1	O	How does your solution integrate with third-party inventory management systems? If you have current or previous customers where you integrated with Follett Destiny, please discuss that experience
10.2	O	What functionality do you have to import/migrate incident, change, and inventory data from a previously existing service management platform
10.3	R	What functionality do you have to allow the creation and updating of an incident from an email? Provide details on how categories, priorities, etc. are applied when an incident is created from an email. Detail how included images and attachments are handled by the system
10.4	O	How does your solution integrate with payment platforms for the billing of work performed? If you have current or previous customers where you integrated with Heartland Payments MySchoolBucks product, please discuss that experience
10.5	O	How does your solution integrate with Student Information Systems, including student/teacher relationships, etc.? If you have current or previous customers where you integrated with Edupoint's Synergy product, please discuss that experience
10.6	O	How does your solution integrate with ERP/HR solutions to provide information on employee locations, positions, etc.? If you have current or previous customers where you integrated with Tyler's Munis/Enterprise ERP product, please discuss that experience
10.7	R	How does your solution integrate with Microsoft Active Directory and/or Azure Active Directory to provide user information including location, title, etc.?
10.8	O	Detail any phone system integration your solution provides that allows for the display of information in the Service Management platform related to a caller

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Req ID	Type	Reporting and Analysis
11.1	R	Describe the overall reporting functionality provided by your platform, as well as the ability to customize those reports based on various parameters (e.g., location, time/date, service agent, etc.)
11.2	R	Describe any export functionality for reports provided by your platform. Include information on the export formats available (e.g., Excel, PDF, etc.)
11.3	O	Describe any functionality your platform provides to schedule and distribute reports on a one-time or recurring basis
11.4	R	Describe any functionality your platform provides for collecting user feedback (e.g., customer satisfaction surveys). Please include information on the ability to customize the information collected, as well as any functionality that allows for different information to be collected based on incident parameters, etc.
11.5	R	Describe any dashboard or other real-time summary view functionality that your platform provides, including what data can be viewed and what customizations are available
11.6	R	Describe the functionality the platform provides to search the various modules (incidents, changes, inventory) including the parameters that can be searched on (e.g., serial#, name, comment contents, etc.)
11.7	O	Describe any features the platform provides for tracking time spent working on an incident ticket
11.8	R	Describe any features the platform provides for reporting on Inventory (e.g., number of devices installed, software versions, warranty/maintenance contract expirations, etc.)

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4.0 References

<u>Vendor Reference Submission:</u>

Vendors shall Copy the information listed below are three (3) refrerences in a Word Document. ***<u>Vendors shall print a hard copy out to submit with their proposal and the file shall be saved as a Word Document on the Electronic Version submitted on a USB Flash Drive</u>***.

4.0 Instructions	
Please provide 3 references of similar size and scope to WCPS for current clients. K-12 educational institutions are preferred, and at least one reference must be a K-12 educational institution.	
Reference 1	
Company Name:	_____
Contact Name:	_____
Contact Phone:	_____
Contact E-mail:	_____
Length of Business Relationship:	_____ Years
Number of Students:	_____
Number of Schools/Sites:	_____
Reference 2	
Company Name:	_____
Contact Name:	_____
Contact Phone:	_____
Contact E-mail:	_____
Length of Business Relationship:	_____ Years
Number of Students:	_____
Number of Schools/Sites:	_____
Reference 3	
Company Name:	_____
Contact Name:	_____
Contact Phone:	_____
Contact E-mail:	_____
Length of Business Relationship:	_____ Years
Number of Students:	_____
Number of Schools/Sites:	_____

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5.0 Additional Information

Note:

Please list any additional important information, in a Word Document labeled "5.0 Additional Information".