

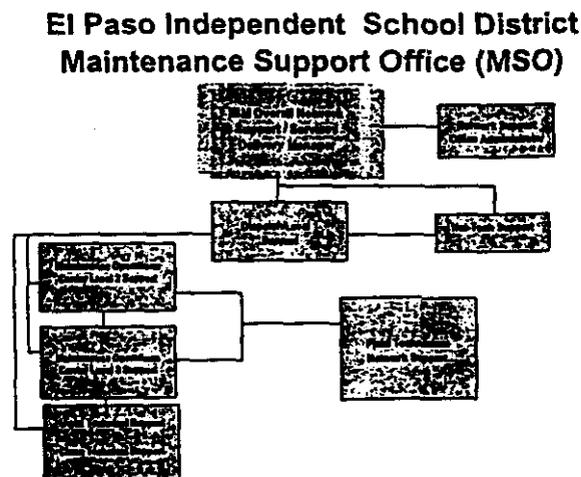
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## 2.3 IBM Responsibilities

The IBM Maintenance Support Office (MSO), as pictured below, is proposed to include the following types of functionality:

- v Overall Maintenance Project Coordinator
- v Maintenance Support Office Administrator Assistant
- v Dispatch/Level 1 Call-in Support
- v Web Maintenance Support
- v Maintenance Operations Center/Level 2 Support
- v Maintenance Operations Center/Level 3 Support
- v Unix/RISC Networking Technical Support
- v Cisco Networking Technical Support
- v Field Technician Network Support
- v Extended Field Technician Network Support

The MSO responsibilities will include:



### Maintenance Support Office (MSO) - Project Office

IBM will provide an overall Maintenance Project Coordinator to provide coordination for execution of telephone assistance, service coordination of problem tickets, administrative tasks, and manage all levels of technical support provided for maintenance. The maintenance support team will be housed in office space, provided by EPISD. This team will maintain a presence in the office during normal business hours, in response to issues and inquiries which may arise during the normal day to day course of operation.

IBM's maintenance project team (and supporting team members) will be available for meetings relating to this project. Meetings are expected to accomplish (and may not be limited to) the following:

- Create documentation and procedures
- Scheduling and long range planning

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- Project reviews and process improvements, on all projects
  - Changes in procedures and documentation

All personnel attending meetings will be prepared to discuss the project, and review maintenance issues as deemed appropriate.

The IBM team will consist of personnel (with the necessary technical and administrative skills) to perform the duties outlined below.

The Maintenance Support Office (MSO) will:

- Provide support Monday - Friday, 8:00-5:00, 52 weeks per year
- Provide tracking and logging of problems during working hours
- Prioritize problems calls and dispatched support
- Develop and maintain Maintenance Support Office operational procedures including, but not limited to, call prioritization guidelines and escalation procedures
- Initiate a Problem Management Record (PMR) to document service outages. A PMR may include information such as date and time opened, description of symptoms, problem assignment (Level 1/Level 2), problem status, and final resolution
- Record, analyze, and report on calls received by the MSO including:
  - Call volumes and duration
  - Problem trends
  - Call abandon rate
  - Problem resolution time
  - Other reports mutually agreed to be IBM and EPISD using available data
- Interface with and coordinate problem determination and resolution with EPISD's appropriate support personnel and third party services providers
- Perform periodic problem reviews for root cause analysis and, in conjunction with EPISD, establish appropriate measures to prevent recurring incidents
- Hold regularly scheduled internal status meetings on open problems
- Schedule technician activities
- Accept incoming support related calls from end users
- Perform initial problem determination
- Perform appropriate level of technical support
- Dispatch support resources, as necessary
- Call users to verify EPISD personnel are prepared for technicians arrival, for scheduled activities
- Work with EPISD to develop documentation related to proper networking operations.
- Create and distribute technical documentation for technicians
- Provide technical resources with a consistent level of support, including appropriate documentation, throughout project duration
- Attend process improvement meetings
- Provide a monthly MSO activity report

### **2.3.1 Maintenance Project Coordination**

The purpose of this role is to provide a single focal point for the maintenance project. Specific to this project, the Maintenance Project Coordinator (with the EPISD assigned project focal point) will establish a framework of documentation through project communications, reports, procedures, and contracted activity. This individual will be dedicated to EPISD for the life of the project. The Maintenance Project

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Coordinator will review work processes, IBM effectiveness, response time, and customer satisfaction on a monthly basis with the EPISD Project Manager.

The Maintenance Project Coordinator will coordinate the following activities of the maintenance project:

1. Procedure development including client support/issue reporting
2. Dispatch process and procedures for EPISD users and IBM technical resources
3. Project Communication. This includes coordination with EPISD buildings, communication of schedules, and interaction with EPISD internal functional areas
4. Coordinate and manage necessary resources to deliver services to EPISD specifically related to the EPISD's maintenance support requirements.
5. Act as initial escalation point of contact for any issues raised as a result of delivery support.
6. Coordinate the establishment of the project environment.
7. Maintain a change control log.
8. Develop a status reporting plan.
9. Prepare materials for EPISD project update status meetings.

Specific to Project tracking and reporting, the Project Office will;

1. Measure, track, document, and evaluate progress
2. Resolve issues with the EPISD Project Manager
3. Review project tasks, schedules, and resources and make changes or additions, as appropriate
4. Conduct regularly scheduled meetings with the project team to review project status
5. Review the project progress with the EPISD Project Manager
6. Prepare status reports
7. Administer the project change control procedure
8. Review and analyze project change requests, and
9. Review the work products being produced by the project team.

#### **Completion Criteria**

This task is complete when the tasks under "IBM Responsibilities" have been completed including the delivery of any deliverable materials.

#### **Deliverables:**

1. Monthly Status Report/Issues List
2. Monthly Maintenance Support Office (MSO) Activity Report
3. Maintenance Support Office Operational Procedures
4. Maintenance Support Office Call Prioritization Guidelines and Escalation Procedures
5. Technical Documentation for Technicians

### **2.3.2 Call-in Dispatch / Technical Maintenance Support (multiple levels)**

The purpose of these roles is to provide call-in and dispatch services, help desk functions and technical support for EPISD personnel as related to support of the EPISD network. These resources will be highly skilled in networking, connectivity and operating system methodologies, Cisco hardware and configuration support. Both telephone and on-site support will be provided. The subtasks are as follows:

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1. Take incoming calls from EPISD users
  2. Learn/understand/support EPISD hardware and operational configurations
  3. Serve as initial point of contact for support, maintenance and problem resolution
  4. Provide systems support for servers, switches, routers, and other network components
  5. Provide "ownership to resolution" of all network problem calls, monitor and report on the progress of problem resolution (through the monthly MSO activity report), confirm resolution of the problem with the end user, and log final resolution via the maintenance tool.
  6. Prioritize problem resolution in accordance with documentation developed by IBM and agreed to by EPISD.
  7. Provide system status messages as requested
  8. Provide web maintenance support
  9. Monitor problem status to facilitate problem closure
  10. Provide problem diagnosis and levels one/dispatch call-in support, level two/advanced network maintenance support, and level three/advanced network maintenance support technical support
  11. Coordinate problem resolution with escalation to appropriate skill level technical resources toward problem resolution goals
  12. Maintain documentation of problem and 'own' problem resolution for in-scope activities, defined as:
    - Netfinity servers (number to be stipulated)
    - RS 6000 servers (to be stipulated)
    - Workstation support related to the network (approximately 10,000 workstations)
    - Networking hardware and configuration support (Cisco networking equipment located in up to 90 buildings)
    - Dial-up/Direct connections to the Internet
    - Network connectivity between buildings
  13. Perform appropriate 'hand-off' of out of scope work functions (i.e. PC workstation warranty work)
  14. Report out of scope activities to project office for proactive interaction with EPISD resources to minimize future occurrences
  15. Assist in the resolution of in scope functions via telephone support or on-site network related support through problem resolution
  16. Dispatch dedicated maintenance field technical resources and track activities through network problem resolution
  17. Dispatch and manage extended field technical network resources and track activities through network problem resolution

#### **Completion Criteria**

This will be considered complete upon the Estimated End Date of this Statement of Work.

#### **Deliverables:**

- Problem Management Records (PMR) to document service outages. PMRs may include information such as date and time opened, description of symptoms, problem assignment (Level 1/Level 2), problem status, and final resolution
- Maintenance Support Office Call Report which includes:
  - Call volumes and duration
  - Problem trends
  - Call abandon rate
  - Problem resolution time
  - And other reports mutually agreed to be IBM and EPISD using available data

### **2.3.3 Systems Maintenance Function Implementation**

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This section consists of the individual phases of the implementation of the network maintenance products within the EPISD environment. The implementation of this plan will provide base maintenance functions for EPISD. It should be stressed that network maintenance is an ongoing activity. Operational improvement and increased return on investment can be achieved through continual customization of the various maintenance functions provided by this plan.

The engagement scope for this project is presented below as a series of separate tasks, each with assumptions, sub tasks, and deliverables. The task numbers do not necessarily reflect the order in which the tasks will be completed during the project.

Please refer to Appendix B for a estimated timeline. If funding is delayed, the timeline will be adjusted to align with funding. However, delays in funding may preclude completion of all Maintenance Functions. If changes are required, they will be handled through the Project Change Control procedure outlined in Appendix A.

### **2.3.3.1 Network Maintenance System Design**

This task of the project consists of design activities, which are intended to create an overall framework in which the network maintenance system will operate. The individual sub tasks within this section consists of the following:

#### **Project Planning**

During this task, a detailed project plan will be developed and agreed to by both IBM and EPISD. The plan will include the various sub tasks described below.

#### **1. Systems Maintenance Function Implementation Plan**

This sub task in the development of the overall project plan for the design and implementation of the systems maintenance functions. This plan will provide the following:

- Project Schedule showing milestone events
- Staffing requirements showing staffing for both IBM and EPISD
- Task dependencies

#### **2. Network Maintenance Architecture Design**

This sub task develops the technical system design for the implementation of the architecture:

- Validate existing hardware and software configurations for maintenance function. Establish naming conventions for the various entities and High-level functional requirements for each maintenance tool, such as number of concurrent operations and number of concurrent and total users
- Operational processes and procedures for such operational tasks as restart and backup
- Define minimum maintenance functions to be provided in the test bed and in the initial framework implementation.
- Documentation of the specific functions to be provided by the network maintenance tool set.
- Specification of the customization necessary for the function to provide maintenance in the production environment.

#### **3. Maintenance Event Design**

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This sub task in the design task consists of the technical design specifications, this task will also address the process and procedure definitions required to implement an effective event maintenance system. These processes and procedures will address areas such as:

- Priority of maintenance response
- Escalation procedures for alerts that are not acknowledged
- Process to assess effectiveness of the current event suite and plan for enhancements
- Reporting requirements
- Documentation of maintenance events
- Tracking maintenance performance

#### **4. Help Desk Design**

This sub task in the design of the help desk processes and procedures including the actual help desk processes, problem management and change management. This work is necessary to provide a functional specification to the Implementation team. Process teams will consist of IBM network maintenance specialists and will conduct workshops with joint participation with EPISD representatives.

**Completion Criteria:** This task will be complete when the specified deliverables are delivered to EPISD.

#### **Deliverables:**

- Systems Maintenance Function Implementation Project Plan
- Network Maintenance Architecture Design
- Maintenance Event Management Design
- Maintenance Help Desk Design
- Maintenance Function Process Guides

#### **2.3.3.2 Detailed Implementation Design and Test Environment Installation**

This task completes the technical design required for the EPISD environment, implements the EPISD test environment, and develops the procedures to be used to roll-out specific maintenance functions. The task includes all the necessary setup to test and implement the various application functions, which make up the network maintenance system.

Although this test bed will be used during the implementation project, it should be viewed as a permanent installation to support the ongoing enhancement of the network maintenance function.

The purpose of a test environment is to provide an isolated mechanism for testing IBM's Maintenance Support Office and its functional interoperability within EPISD's user universe. This test environment will be in place for the duration of the contract. Its composition should be a microcosm of the actual EPISD's production environment.

#### **2.3.3.3 Deployment of Network Maintenance Framework**

This task implements the network maintenance function framework on the specified maintenance servers. In general there will be central servers performing the following tasks:

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- Overall maintenance focal point
  - Hardware and Software inventory
  - Maintenance event management and correlation
  - Network maintenance
  - Maintenance problem and change management
  - Maintenance database

The functions to be implemented are similar to those described above for the test bed; the difference is that this set of functions will be implemented on the servers intended to support production maintenance activities.

**Completion Criteria:** This task will be complete when the minimum functional capabilities described in the Network Maintenance Architecture Design have been implemented for the production file servers.

**Deliverables:** None

#### **2.3.3.4 Deployment of Server and Network Monitoring**

This task implements operational server software in combination with network devices to provide the capability to remotely access individual network components to perform a variety of operational tests.

The status of these devices will then be available at a central site.

Customization of the production maintenance servers will be done as defined in the Network Maintenance Architecture System Design and Maintenance Event Management Design documents developed in task 2.3.3.1.

**Completion Criteria:** This task will be complete when the server and network monitoring is operational for the specified number of machines and the functions defined in the design documents has been demonstrated.

**Deliverables:** None

#### **2.3.3.5 Inventory**

This task will provide a one time inventory of the physical network components; the time frame to be mutually agreed to by IBM and EPISD. This task also includes the process and procedure development to support the ongoing asset management (inventory) functions within EPISD. Inventory will include: Manufacturer, number of devices, machine type, model number, serial number, and the location of devices in up to 90 EPISD buildings.

Customization of the production management servers to support inventory functions will be done as defined in the Network Maintenance System Design documents developed in task 2.3.3.1.

**Completion Criteria:** This task will be complete when the Physical Inventory Report is delivered to EPISD.

**Deliverables:** Physical Inventory Report.

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### **2.3.3.6 Maintenance Event Consolidation & Automation**

This task will provide the base functions for maintenance event management across the EPISD enterprise. It creates an infrastructure where events from multiple maintenance function and/or resources may be brought together and managed using a common set of function and methodologies. The purpose of this task is to implement and demonstrate consolidation, automation, correlation, and presentation capabilities. Maintenance Event management should be an ongoing process performed by the MSO support team.

In this task, data from multiple devices will be consolidated and correlation between multiple inputs will be implemented. In addition, automatic integration with the help desk can be implemented for certain events to open and close trouble tickets.

Customization of the production servers will be done as defined in the Network Maintenance Architecture Design and Maintenance Event Management Design documents developed in task 2.3.3.1.

**Completion Criteria:** This task will be complete when maintenance event consolidation and automation is operational as defined in the referenced design documents.

**Deliverables:** None

### **2.3.3.7 Help Desk Problem and Change Maintenance Function**

This task will implement the integrated help desk products for problem and maintenance change management to provide for problem logging and management from the initial event through closure. In addition the integrated maintenance change management function will allow changes to be requested and tracked to completion.

Planning for the rollout to production of the new help desk will be included in this task. Customization of the production help desk management servers will be done as defined in the Network Maintenance Architecture Design, Maintenance Help Desk Design and Maintenance Event Management Design documents developed in task 2.3.3.1.

**Completion Criteria:** This task will be complete when help desk problem and change maintenance function are operational as defined in the referenced design documents.

**Deliverables:** None

### **2.3.3.8 User Administration**

This task will begin the development of the infrastructure required to provide a single end-user interface and database for the administration of user IDs and passwords across the multiple types of resources. The user administration functions contained in the maintenance tool set will allow centralized trouble resolution and control of access to EPISD systems.

Customization of the production server administration and security maintenance functions will be done as defined in the Network Maintenance Architecture Design and Maintenance Help Desk Design documents developed in task 2.3.3.1.

This task will also address the necessary processes and procedures (documentation) required for the successful implementation of the administration functions.

**Completion Criteria:** This task will be complete when user administration functions are operational as defined in the referenced design documents.

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**Deliverables:** Administration Process and Procedures Documentation

### **2.3.3.9 Remote Control**

This task will implement the remote control product to allow help desk and support personnel to access remote components of the overall network to do diagnostic and problem support tasks. In addition, this task will include development and documentation of the necessary methods and procedures.

Customization of the production remote control function will be done as defined in the Network Maintenance Architecture Design and Maintenance Help Desk Design documents developed in task 2.3.3.1.

**Completion Criteria:** This task will be complete when user administration functions are operational as defined in the referenced design documents.

**Deliverables:** Remote Control Methods and Procedures Documentation

## **2.4 EPISD Responsibilities**

The responsibilities listed in this section are in addition to those responsibilities specified in the Agreement and are to be provided at no charge to IBM. IBM's performance is predicated upon the following responsibilities being fulfilled by EPISD.

### **2.4.1 EPISD Project Management**

Prior to the start of this Statement of Work under the Agreement, EPISD will designate a person, called the EPISD Project Manager, to whom all IBM communications will be addressed and who has the authority to act for EPISD in all aspects of the contract.

The responsibilities of the EPISD Project Manager include:

1. Serve as focal point for communication with IBM Maintenance Project Coordinator
2. Serve as the interface between the IBM Maintenance Support Office and all EPISD organizations covered/involved under this Statement of Work..
3. Assist the IBM Maintenance Project Coordinator in administering the Project Change Control Procedures.
4. Participate in any problem resolution meetings that may occur.
5. Obtain and provide information, data, decisions and approvals, within three days of IBM's request unless EPISD and IBM agree to an extended response.
6. Help resolve issues and escalate issues within the EPISD organization, as necessary.

### **2.4.2 Additional Responsibilities**

EPISD agrees to assume responsibility for providing the following information and/or services as a part of this Statement of Work:

1. EPISD will provide contiguous office space, telephone and data lines, reproduction services and related supplies to IBM personnel while working on EPISD premises. Access to electronic mail, LANs and printers will be provided as appropriate. Off-site facilities can be negotiated; however, best results occur with staff on site.

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2. EPISD will provide security clearance and building access for IBM project personnel. Most of the work involved in this project will be performed during normal working hours (8:00am to 5:00pm). However, on some occasions IBM may need to provide access to facilities outside of these hours.
  3. EPISD will provide IBM access and security to the EPISD systems as required.
  4. EPISD will provide a detailed address listing for all EPISD installation locations included in the scope of this Statement of Work.
  5. EPISD will provide physical hardware location information within any given EPISD supported location.
  6. EPISD will supply a knowledgeable technical resource to assist with any customization procedures for servers, workstations and printers thirty (30) days prior to any installation activities.
  7. EPISD is responsible for the actual content of any data file, selection, and implementation of controls on its access and use, and security of the stored data.
  8. EPISD will need to guide IBM in optimally configuring core products to meet specific needs. The full maintenance deployment will take approximately 12 months. IBM requires EPISD to provide direction on current processes, desired processes, advise on current standards and desired standards, advise on current technical standards and environment, and provide access to the current systems.
  9. The terms of this contract and USF funding extend through June 30, 2002. Maintenance functions do require post implementation support which is not included in this Statement of Work, to maintain the maintenance environment. IBM can provide this support, at an additional charge. Minimally, two trained resources will be required to maintain the environment and provide backup support to each other.

### **2.4.3 Federal, State, and Local Laws**

EPISD is responsible for the identification and interpretation of any applicable laws, regulations, and statutes that impact the activities, efforts and results of this project. It is the responsibility of EPISD to assure that any actions taken meet the requirements of those laws. IBM will comply with requirements of which it is aware and reasonable requests of EPISD relating to compliance with such requirements.

## **2.5 Deliverables/Documentation**

IBM will provide one (1) hard copy of the following Type II items to the EPISD Project Manager under this Statement of Work:

- ◆ Monthly Status Report/Issues List
- ◆ Monthly Maintenance Support Office (MSO) Activity Report
- ◆ Maintenance Support Office Operational Procedures
- ◆ Maintenance Support Office Call Prioritization Guidelines and Escalation Procedures
- ◆ Technical Documentation for Technicians
- ◆ Problem Management Records (PMR) to document service outages.
- ◆ Maintenance Support Office (MSO) Call Report which includes:
  - Call volumes and duration
  - Problem trends
  - Call abandon rate
  - Problem resolution time
  - Other reports mutually agreed to be IBM and EPISD using available data
- ◆ Systems Maintenance Function Implementation Project Plan

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- ◆ Network Maintenance Architecture Design
  - ◆ Maintenance Event Management Design
  - ◆ Maintenance Help Desk Design
  - Maintenance Function Process Guides
  - Physical Inventory Report
  - ◆ Administration Process and Procedures Documentation
  - ◆ Remote Control Methods and Procedures Documentation

## 2.6 Completion Criteria

IBM shall have fulfilled its obligations under this Statement of Work when any of following first occurs:

- ◆ IBM accomplishes the IBM tasks described under "IBM Responsibilities" including delivery to EPISD of the materials listed under "Deliverable Materials"
- ◆ Notwithstanding any other provision, the District has the right to terminate this agreement for business reasons if termination notice is given to IBM prior to any work being performed or service provided.
- Either of us terminates according to the provisions of the *Agreement*.
- Contract End Date is reached

## 2.7 Estimated Schedule

The estimated schedule for this effort is 12 months from the date of project initiation.

Start Date:	July 1, 2001
End Date:	June 30, 2002

Work will begin July 1, 2001, given that EPISD receives adequate funding for the project. IBM requires a minimum of 30 days notice of project commencement for staffing purposes.

The schedule shall be consistent with the completion dates identified by the EPISD and agreed to by IBM. Reasonable effort shall be made by IBM and EPISD to keep the schedule dates intact.

IBM will not be responsible for delays or additional requirements imposed by any government agencies. The IBM will not be responsible for delays caused by delays in project funding, labor disputes, fire, unavoidable casualties, or unforeseen conditions.

## 2.8 Year 2000 Provisions

IBM is not providing any Year 2000 services under this Statement of Work. IBM Product Specifications specify the Year 2000 readiness of the IBM Products. IBM does not make any representations regarding the Year 2000 readiness of non-IBM Products.

Under the terms of this Statement of Work we are not responsible for 1) your products, 2) a third party's products (including products you license from our subcontractors) or 3) IBM's previously installed products, ("Other Products") to correctly process or properly exchange accurate date data with the Products or deliverables we provide. We will be relieved of our obligations under this Statement of Work due to the inability of such Other Products to correctly process or properly exchange accurate date data with the Products or deliverables we provide to you.

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## 2.9 Charges

The Services Charge stated here represents the maximum allowable charges for all services that may be provided under this Statement of Work. IBM understands that the decision to implement this project is contingent upon award to the District of funding under the E-Rate program. IBM will not begin work on this project without written notification from EPISD that funding has been approved and that work should begin. If such notification has not been received by December 31, 2001, at Vendor's option, Vendor may terminate this Statement of Work or implement an extension of this Statement of Work, as well as changes in pricing or other terms and conditions as may be required, via the Project Change Control Procedure outlined in Appendix A.

This agreement may be extended upon mutual agreement between EPISD and IBM as defined in the section titled Project Change Control Procedure.

**Total Services Charge . . . . . \$ 27,121,700, including travel and living.**

For purposes of applying for FCC Snowe-Rockefeller E-Rate funding, the following breakout is provided.

A) E-Rate Eligible Portion..... \$ 27,121,700  
B) Non-Eligible Portion..... \$ 0.00

**E-Rate Invoicing:** Prior to commencing work, IBM requires 1) a fully signed contract signature sheet; 2) a P.O. in the amount that the E-Rate program is not funding (e.g. non-discounted portion of the eligible costs plus the non-eligible costs), and; 3) a copy of the E-Rate funding approval letter.

As a service to the school, IBM will perform dual billing per E-Rate terms and conditions. First, IBM will invoice the school monthly, as work is completed, for the 'non-discounted' portion of the ELIGIBLE items. Secondly, under separate invoice, IBM will invoice the E-Rate FCC Snowe-Rockefeller administration for the remaining discounted portion of the ELIGIBLE items. Payment is due as specified in the invoice. Please note that although IBM will only bill the school for those charges not eligible under the E-Rate program, the school assumes responsibility for the entire contract services charge. Notwithstanding any other provision, the District has the right to terminate this agreement for business reasons if written termination notice is given to IBM prior to any work being performed or service provided.

Excluded from the Services Charge are items involving, but not limited to; repairs to the Location for correcting existing code deficiencies, painting, asbestos removal, plumbing, heating and ventilation, air conditioning work, etc.

IBM Service Provider Identification Number (SPIN): 143005607.

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## **Appendix A. Project Change Control Procedure**

The following provides a detailed process to follow if a change to this Statement of Work (SOW) is required.

When both of us agree to a change in this Statement of Work, we will prepare a written description of the agreed change (called a "Change Authorization"), which both of us must sign. The Change Authorization will describe the change, the rationale for the change, and specify any change in the charges, estimated schedule, or other terms. Depending on the extent and complexity of the requested changes, we may charge for our effort required to analyze it. When charges are necessary in order for us to analyze a change, we will give you a written estimate and begin the analysis on your written authorization. The terms mutually agreed upon Change Authorization will prevail over those of this Statement of Work or any previous Change Authorization.

## Appendix B. Systems Maintenance Function Implementation Estimated Timeline for Phased Approach

Task Name	Duration	Start Date	Finish Date	Predecessors
Total Project	255 days	July 3, 2001	August 3, 2001	
Project Management	255 days	July 3, 2001	August 3, 2001	
Architecture and Design	40 days	July 3, 2001	August 25, 2001	
Architecture Design and Planning	40 days	July 3, 2001	August 25, 2001	
Establish Test Lab	50 days	August 28, 2001	November 17, 2001	Architecture and Design
Base Servers	15 days	August 28, 2001	September 29, 2001	
Evert Servers	15 days	September 29, 2001	October 20, 2001	Base Servers
Other Components	20 days	October 20, 2001	November 17, 2001	Evert Servers
SMFDR Process Design	100 days	July 3, 2001	November 17, 2001	
Intro Problem, Change, Evert	50 days	July 3, 2001	September 8, 2001	
Other Processes	50 days	September 11, 2001	November 17, 2001	SMFDR Process Design
Service Desk Implementation	60 days	September 11, 2001	December 1, 2001	
Procedures	40 days	September 11, 2001	November 3, 2001	SMFDR Process Design
Implementation	40 days	September 11, 2001	November 3, 2001	SMFDR Process Design
Production Release	20 days	November 6, 2001	December 1, 2001	Service Desk Implementation
Evert Management	145 days	September 11, 2001	March 30, 2002	
Evert Management Design	50 days	September 11, 2001	November 17, 2001	SMFDR Process Design
Procedures	10 days	November 20, 2001	December 1, 2001	Evert Management Design
Customize	30 days	December 4, 2001	January 12, 2002	Evert Management Procedures
Configure/Deploy	45 days	January 15, 2002	March 16, 2002	Base Servers and Evert Management Customization
Production Release	10 days	March 19, 2002	March 30, 2002	Evert Management Configure/Deploy
SMD/Inventory	100 days	November 20, 2001	April 6, 2002	
Procedures	20 days	November 20, 2001	December 15, 2001	SMFDR Process Design
Customize	20 days	December 18, 2001	January 12, 2002	SMD Procedures
Configure/Deploy	40 days	January 15, 2002	March 9, 2002	SMD Customize
Production Release	20 days	March 12, 2002	April 6, 2002	SMD Config/Deploy
User Admin/Remote Ctl	85 days	April 9, 2002	June 30, 2002	SMD/Inventory
Procedures	20 days	April 9, 2002	May 4, 2002	
Customize	20 days	May 7, 2002	June 1, 2002	User Admin Procedures
Configure/Deploy	30 days	June 4, 2002	June 30, 2002	User Admin Customize
Production Release	15 days	June 10, 2002	June 30, 2002	User Admin Configure/Deploy
Print/Copy/Other	70 days	November 20, 2001	February 23, 2002	
Procedures	20 days	November 20, 2001	December 15, 2001	SMFDR Process Design
Customize	20 days	December 18, 2001	January 12, 2002	Print/Copy Procedures
Configure/Deploy	20 days	January 15, 2002	February 9, 2002	Print/Copy Customize
Production Release	10 days	February 12, 2002	February 23, 2002	Print/Copy Config/Deploy

## Appendix C. Signature Page

### IBM Statement of Work for Product Support Services Custom Services

IBM (we) will provide, and EPISD (you) agree to accept, IBM Services (Services) for "USF Maintenance Services" under the terms and conditions of the IBM Customer Agreement and this Statement of Work.

For Scope of Services, Completion Criteria Changes, and other applicable terms refer to the IBM Proposal for the provisions of EPISD "USF Maintenance Services", dated January 18, 2001.

This proposal will remain valid through December 31, 2001.

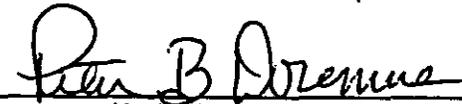
Total Charges: \$ 27,121,700, which includes travel and living.

Both of us agree that the complete agreement between us regarding these Services will consist of 1) this Statement of Work and 2) the IBM Customer Agreement (or any equivalent agreement signed by both of us).

Agreed to:  
El Paso Independent School District

Agreed to:  
International Business Machines Corporation

By   
(Authorized Signature)

By   
(Authorized Signature)

Name Yinuo Du  
(type or print)

Name Peter B. Doremus  
(type or print)

Date 1-18-01

Date 1-18-01

Customer Number: 2760555

IBM Customer Agreement No. NB8C298

Customer Address:  
El Paso Independent School District

IBM Office Address:  
4487 North Mesa

6531 Boeing Dr.

El Paso, Texas 79902

El Paso, TX 79925

Project name or identifier: EPISD USF Maintenance Services  
IBM Office Number: TDC  
Start Date: July 1, 2001  
End Date: June 30, 2002

**IBM**  
**STATEMENT OF WORK FOR**  
**EL PASO INDEPENDENT SCHOOL DISTRICT**  
**FOR**  
**EMAIL**



**JANUARY 18, 2001**

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# **STATEMENT OF WORK**

## **Statement of Work - Introduction**

This section describes the Services that IBM will provide under the terms of the IBM Customer Agreement (ICA) and this Statement of Work (SOW). Specifically, IBM will provide El Paso Independent School District (El Paso ISD) with a set of customized services. The details of the Services to be provided are described in this section. These Services will be provided at existing and newly built El Paso ISD locations in El Paso, Texas.

**This Statement of Work is comprised of the following sections:**

- 1.0 Assumptions
- 2.0 IBM Responsibilities
- 3.0 El Paso ISD Responsibilities
- 4.0 Deliverable Materials/Documentation
- 5.0 Project Schedule
- 6.0 Completion Criteria
- 7.0 Charges
- 8.0 Project Warranty

The following are incorporated in and made part of this Statement of Work:

- Appendix A, Deliverable Guidelines
- Appendix B, Project Change Control Procedure
- Appendix C, Equipment and Operational Software

Changes to this Statement of Work will be processed in accordance with the procedure described in Appendix B, "Project Change Control Procedure." The investigation and the implementation of changes may result in modifications to the Schedule, Charges or other terms of this Statement of Work.

This proposal will expire December 31, 2001 unless this date is extended by IBM in writing.

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## 1.0 Assumptions

This Statement of Work and IBM's estimates to perform the Statement of Work are based on the following assumptions. Deviations that arise during the proposed project will be managed through the procedure described in Appendix B, "Project Change Control Procedure."

1. El Paso ISD personnel who will be assigned to this project will have the technical skills necessary to participate in the project.
2. El Paso ISD IS and user personnel will be available as described in 3.0, "El Paso ISD Responsibilities."
3. Work under this Statement of Work will be performed at sites within the El Paso ISD and will not require travel to sites outside district boundaries.
4. Only those components specified in this SOW are to be supplied and installed by IBM. Additional components can be specified via the Project Change Control Procedure detailed in Appendix B.
5. Work under this contract will be performed during school hours (7:00 a.m. and 4:00 p.m.) unless otherwise mutually agreed upon by IBM and El Paso ISD.
6. Work to be performed at specific sites will be mutually agreed to and scheduled with IBM and El Paso ISD at least ten (10) business days prior to the commencement of the work.
7. IBM and our subcontractor will have unlimited, unrestricted access to all buildings. Any security requirements inclusive of guards, security codes/access codes, lighting and internal access and/or central monitoring are the responsibility of El Paso ISD.
8. IBM will be provided with access badges, keys and combinations or escorts to perform the work described in this SOW. Any delay encountered due to unavailability of buildings may result in additional charges being incurred by El Paso ISD. If this situation arises, it will be addressed via the Project Change Control Procedure detailed in Appendix B.
9. It is understood by El Paso ISD and IBM that this SOW is based upon the start date provided below. In the event this date is not achieved, IBM reserves the right to extend the projected project completion date on a working day for working day basis, and as mutually agreed upon by IBM and El Paso ISD via the Project Change Control Procedure detailed in Appendix B.
10. It is understood by El Paso ISD and IBM that this SOW and the pricing associated with this SOW are based upon the award of the total proposed SOW described in this document. The work described in this SOW will be performed during one continuous phase.
11. El Paso ISD will provide remote access to the EPISD network for maintenance support.

## Exclusions from this Statement of Work

1. IBM is not responsible under this SOW for the identification or correction of any existing safety and/or code violations, whether federal, state or local, including but not limited to fire and electrical codes. If IBM should discover any safety and/or code violations during the course of this project, IBM will notify El Paso ISD of the problem. IBM will not be

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required to proceed with its work under this SOW until El Paso ISD remedies such violation, nor will IBM be responsible for delays to the work caused by such violation.

2. On-going network operations and Coordination are not included in this Statement of Work. IBM would be pleased to respond to El Paso ISD for the addition of these services.
3. Relocation and testing of existing computers, telecommunications, or CCTV equipment(s) or systems are not required.
4. Removal of existing telecommunications or CCTV cabling is not required.
5. No data Media Converters are being supplied by this Statement of Work.
6. Installation of any hardware, software, and network electronics not specified in this SOW (e.g., workstations, servers, printers, routers, DSUs/CSUs, repeaters, modulators) is the responsibility of El Paso ISD.
7. It is understood by El Paso ISD and IBM that all matters relating to physical construction of new wiring closets/equipment locations and retrofits for existing wiring closets/equipment locations, (general construction buildout, HVAC, electrical, lighting, construction permits) is the responsibility of El Paso ISD.
8. It is agreed that all non e-rate eligible products and services are excluded from this agreement and is included in a separate contract.

## **2.0 IBM Responsibilities**

### **2.1 Project Coordination**

**Task Description:** The objective of this task is to provide technical direction, maintain project control and to establish a framework for project communications, reporting, procedural, and contractual activity for the IBM tasks described. This task consists of the following activities:

- Establish and coordinate IBM efforts with the El Paso ISD Project Coordinator.
- Develop and maintain work plans for the performance of IBM responsibilities.
- Administer the Change Control Procedures.
- Maintain communications and review progress with the El Paso ISD Project Coordinator and team members during status meetings.
- Prepare and submit written Monthly Status Reports of IBM activities to the El Paso ISD Project Coordinator.

**Completion Criteria:** This task will be considered complete when the other tasks identified under IBM Responsibilities have been completed and the Final Status Report has been delivered to the El Paso ISD Project Coordinator.

**Deliverables/Documentation:** Monthly Status Reports.

### **2.2 Email Installation Planning**

**Description:** To perform planning and assessment for email deployment.

The major sub tasks are:

1. Define roles & responsibilities for email deployment.

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2. Develop distributed email architecture.
  3. Develop standard district-wide naming conventions.
  4. Specify email server sizing & configuration.
  5. Develop minimum client specifications for desktop hardware, software, and Operating systems.
  6. All standard desktop computers should meet or exceed the following specifications:
  7. Windows 95/98 computer, 266 MHz Pentium processor, 64MB ram, 300MB free disk space
  8. Power Macintosh 6500, 64MB RAM, 300MB free disk space, System 8.1
  9. Develop email migration strategy for users with current email accounts.
  10. Develop phased implementation & deployment plan.
  11. Assist in development of district-wide email Policies & Procedures.
  12. Assist in developing standards for connectivity, security, and access from outside the firewall.

**Completion Criteria:** This task will be considered complete when IBM delivers report of Email planning summary to the EPISD Project Coordinator.

**Deliverable/Documentation:** Email Planning Summary Report

**Assumptions:**

1. Desktop Hardware or software upgrades, where required will be performed under separate contract.
2. Full and timely cooperation and participation of EPISD staff.

### **2.3 Email Deployment**

**Description:** To install e-mail servers and operational software.

The major sub tasks are:

1. Install and configure central email server cluster.
2. Install & configure DNS server.
3. Install & configure IBM I servers. (2)with free firewall software.
4. Test, and performance-tune servers and mail routing performance.
5. Configure, and test for connectivity with external mail providers.
6. Develop end-user training curriculum and materials, and train trainers.
7. Generate district-wide email directory through data import from existing data sources.
8. Register new email accounts and set up mail boxes (3000).

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**Completion Criteria:** This task will be considered complete when Email servers have been configured and 3000 email accounts have been enabled.

**Deliverable:** Documentation Email server configuration document and TCO Software license certificates.

**Assumptions:**

Includes: Installation -- 200 person-days of on-site client installation.

## **2.4 Email Follow-up**

**Description:** To perform maintenance, support and Phase 2 planning.

The major sub tasks are:

- Provide email support to the District and end users with up to four-hour on-site response during working hours.
- Provide on-going email system maintenance, including software updates.
- Prepare documentation for subsequent phases of email deployment.

**Completion Criteria:** This task will be considered complete when the contract period of twelve (12) months is completed and the plan for subsequent phases of email deployment is delivered to the EPISD Project Coordinator.

**Deliverable/Documentation:** Plan for subsequent phases of email deployment.

**Assumptions:**

Full and timely cooperation and participation of EPISD staff.

## **2.5 Web Maintenance**

**Description:**

**Overview**

A successful Web strategy in the K-12 education arena includes an effective Web presence in the following three areas:

Public District Web site

Private District Intranet site

Campus web sites for internal and external access

In order to maintain uniform standards of appearance, navigation and access, we propose to implement a common template-based structure for all three areas of Web presence. IBM will provide a palette of standard Web site components that can be combined in various combinations to produce harmonious Internet and Intranet sites.

Content Filtering is a needed service for controlling web access to inappropriate content. We will provide CyberPatrol content filtering on two servers to allow content filtering of Internet access. Regular updates will be automatically made to the list of restricted sites

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under separate contract. This is a subscription-based service with one-year subscription for 25,000 PCs with access to the Internet included.

### **Summary of Services**

IBM will provide skilled technical staff to provide services in the following areas of activity:

The major sub tasks are:

#### **1. Web Planning**

- a. Establish and facilitate a District Web Policy steering committee.
- b. Designate Web roles & responsibilities, both internal & external.
- c. Assist in developing District-wide Web Policies & Procedures.
- d. Develop a comprehensive Web implementation strategy, including input from stakeholders throughout the district.
- e. Develop a phased Web implementation plan.
- f. Develop graphic & layout design standards, and navigation standards.
- g. Develop security, access and authentication standards.
- h. Develop a strategy for distributed Web maintenance, including template-based design and designated Content Managers.
- i. Specify, provide and configure servers for all Web applications.

#### **2. Web Deployment**

- a. Provide a toolkit of reusable Web component templates. Some examples include:
  - i. Web Shell for page-based content
  - ii. Calendar of Events
  - iii. Staff Directory
  - iv. Search Interface
  - v. Policies & Procedures
  - vi. Moderated Discussion
  - vii. Newsletter & News Bulletin
  - viii. FAQ / Q&A
  - ix. Knowledgebase
  - x. Training Schedules / Sign-up
  - xi. Cafeteria Menus

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- xii. Lotus QuickPlace for building instant places for ad hoc working groups, including as examples: class projects, teams, clubs, etc.
  - b. Implement Web security, including integration with Firewall Server.
  - c. Provide Content Manager Training.
  - d. Provide Web administrator staff training (included 7 days classroom training for up to 6 administrators).
  - e. Provide site development services to bring up initial sites.

### **3. Web Maintenance Follow-up**

- a. Provide site maintenance & user support with up to four hour on-site response during working hours.
- b. Conduct research & planning for future Intranet integration with internal systems: online form entry, etc.

**Completion Criteria:** This task will be considered complete when the Web Planning Summary Report is delivered to the EPISD Project Coordinator.

**Deliverable/Documentation:** Web Planning Summary Report

## **2.6 Web Applications**

**Description:** The Domino platform supplied by IBM provides a rich and robust application platform for many types of document-based or workflow-enabled applications. By limiting a Domino implementation solely to email, users get the benefit of Domino's excellent mail services, but they will likely not experience the types of added-value services that the Domino platform can so powerfully provide. We will provide and install three Domino applications as pilots for three selected groups within the district. These applications will provide users with an experience of the types of rich applications available for Domino, they will provide immediate productivity enhancements, and they will serve as a basis for later expansion, customization and wider deployment of these and other Domino-based applications.

IBM will provide skilled technical staff to provide pilot application solutions in the following area.

### **Email Desktop Applications**

- a. Identify a pilot group (limited to 150 users) for the District.
- b. Install and configure this application suite.
- c. Provide user and administrator training for this application.

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- d. Provide limited application tailoring and customization.
  - e. Provide on-going application and user support with up to four-hour on-site response during working hours.

**Completion Criteria:** This task will be considered complete when aforementioned applications are installed and configured and pilot users and administrators have been trained.

**Deliverables/Documentation:** Software license agreements for Email.

**Assumptions:**

EPISD will assist in identifying enthusiastic participants for the pilot groups.

## **Email Hardware & Operational Software**

### **Hardware**

(1 ea) IBM Netfinity server for DNS & SameTime services IBM Netfinity 6000R (2) 700MHz Pentium III Xeon, 2660MB RAM (2) 9.1GB HD, Redundant power supply

(1 ea) IBM Netfinity server for Web Intranet & Applications server (inside the firewall) IBM Netfinity 6000R (2) 700MHz Pentium III Xeon, 2660MB RAM (3) 9.1GB HD, Redundant power supply

(1 ea) IBM Netfinity server for Web services IBM Netfinity 6000R (2) 700MHz Pentium III Xeon, 2660MB RAM (3) 9.1GB HD, Redundant power supply

Rack, UPS, keyboard and monitor for above.

### **Email Software**

Email Communications Total Campus Option (TCO); IT Factory Business Suite license for 150 users on single server.

(2) WebSphere Edge Server software (for load balancing to Content Filtering servers, to be installed on RS/6000 B50s not included in this SOW)