

**APPROVE ENTERING INTO AN AGREEMENT WITH RWD TECHNOLOGIES, LLC  
FOR CONSULTING SERVICES**

**THE CHIEF EXECUTIVE OFFICER REPORTS THE FOLLOWING DECISION:**

Approve entering into an agreement with RWD Technologies, LLC to provide consulting services to the Department of Human Resources at a cost not to exceed \$2,000,000. Consultant was selected on a competitive basis pursuant to Board Rule 5-4.1. A written agreement for Consultant's services is currently being negotiated. No services shall be provided by Consultant and no payment shall be made to Consultant prior to the execution of the written agreement. The authority granted herein shall automatically rescind in the event a written agreement is not executed within 90 days of the date of this Board Report. Information pertinent to this agreement is stated below.

**Specification No.: 08-250031**

**CONSULTANT:** RWD Technologies, LLC  
5521 Research Park Drive  
Baltimore, MD 21228  
Contact: Brian Laphorn, Division Director  
Phone No.: 513-697-2562  
Vendor No.: 68373

**USER:** Department of Human Resources  
Professional Development Unit  
320 N. Elizabeth Street  
Chicago, IL 60608  
Contact: Amanda Rivera, Director  
Phone No.: 773-553-6729

**TERM:** The term of this agreement shall commence on January 1, 2009 and shall end December 31, 2009. This agreement shall have two (2) options to renew for one year each.

**EARLY TERMINATION RIGHT:** The Board shall have the right to terminate this agreement with 30 days written notice.

**SCOPE OF SERVICES:** Consultant shall provide the following services:

1. Review and validate the Board's professional development business process requirements as related to the use of the PeopleSoft Enterprise Learning Management (ELM) system.
2. Work with the Professional Development Unit to plan and implement new business processes as needed with the use of the PeopleSoft ELM system.
3. Utilize formal Change Management techniques to manage the professional development business process reengineering and the ELM deployment and training for all Central Office and school based employees.
4. Train the Central and Area Offices employees in these locations on the system functionality and new business processes.
5. Manage the deployment of the new Professional Development Unit business process changes to 600+ schools and train school employees on the module functionality and new professional development business processes.
6. Develop and implement a Change Management project plan defining the tasks, milestones, and deliverables for all the phases of the ELM Implementation.
7. Develop a Change Management marketing strategy and implementation plan.

8. Prepare a cost/benefit assessment for each of the deliverables.
9. Create business process reengineering deliverables including current state and future state for the process owners' departments in the ELM project.
10. Create a training plan and Professional Development Unit departmental Change Impact Assessment for each of the departments participating in the ELM project.
11. Develop and present training materials, schedule and conduct training sessions for each department.
12. Provide Change Management knowledge transfer training for HR PDU Process Owners.
13. Create a Professional Development Unit Organization Assessment.
14. Plan, Communicate, and Implement change execution.
15. Create performance tracking based on business process change implementations.
16. Make recommendations for ELM Business Owner Participants Recognition & Rewards.

**DELIVERABLES:** Consultant will provide the following:

#### 1. Phase 1: ELM Pilot Implementation

During Phase 1 of the ELM Implementation Project, the Consultant will provide the following services and products to HRIS, HR Professional Development Unit, and the users of the ELM application.

- a. **Change Management Implementation Services** - Consultant will guide the designated ELM pilot team members to reengineer their professional development business process to incorporate the ELM system using their Change Management and marketing strategies.
- b. **Change Management Implementation Plan** - Consultant will be required to provide a complete plan for administrating change to the professional development business process based on the implementation of the ELM system.
- c. **Change Management Marketing Plan** - Consultant shall develop a Change Management Marketing Plan that will communicate the proposed business process changes to the users of the ELM system, throughout the District.
- d. **Training Plan** - Consultant shall use its methodology for training to users of the ELM system that will facilitate their adaptation to effectively use the system in their new business processes.
- e. **User Training** - Consultant shall provide detailed course descriptions and samples of course materials, including quick reference guides.
- f. **Training Materials** - Consultant shall develop all of the materials required to train all of the required individuals in the modules.
- g. **Security Awareness Training** - The Board will require the Consultant to assist in developing a security awareness project as part of the larger training project for the Board staff. The Consultant shall develop materials to be included in new staff orientation as well as yearly refresher courses.
- h. **Training Delivery** - Consultant shall provide instructors to deliver the training. The Consultant shall also work with the ELM project team to define and document the needed PeopleSoft Training Instances and the delivery method, as well as to develop a plan for refreshing training data during the course of the project. CPS will retain ownership of any/all materials created for the project, inclusive of content.
- i. **Issue, Risk, and Change Order Management** - Consultant shall be responsible for capturing and managing issues and risks that arise during the Change Management process using the ELM project issue management process.
- j. **Business Readiness Assessment** - Consultant shall provide a readiness assessment of the Professional Development Unit for implementing the new business processes.

- k. **Status Reporting and Status Meetings** - Consultant shall be responsible for composing and delivering a weekly status report discussing the overall Change Management progress.
- l. **Central Office, School, and Business Service Center Deployment** - Consultant shall plan and schedule the Central Office, School, and Business Service Center deployments in conjunction with the ELM system deployment.
- m. **Knowledge Transfer and Project Wrap-Up Activities** - Consultant shall transfer all knowledge gained and developed during the Project to the appropriate the Board personnel to ensure that the Board can take over the maintenance of the PeopleSoft modules.
- n. **Support Overview** - Consultant shall recommend the number and role of support individuals to be provided during post-production support (during and after cut-over, and before School and Business Service Center deployment begins) and for School and Business Service Center support.

**2. Phase 2: ELM Implementation for Remaining District Departments and Providers**

The Consultant will make Change Management recommendations on how the remaining District departments and providers should implement the ELM system based on lessons learned from the pilot implementation. The Consultant will develop the phase two Change Management strategies and training plan.

**OUTCOMES:** Consultant's services will result in the Chicago Public Schools adapting the new Professional Development Unit business processes and related Board processes, which will include the PeopleSoft Enterprise Learning Management system at its core. The implementation of ELM will facilitate the standardization of CPS Professional Development business processes and provide a centralized solution to managing the planning, delivering, and results tracking of learning events within the district for all CPS employees and providers.

**COMPENSATION:** Consultant shall be paid as follows: hourly rate of \$ 240.00 in accordance with the fixed fee portion of the contract and time and materials may be billed for the agreed-upon portion of the contract. In total, the contract payout will not exceed the sum of \$2,000,000.

**REIMBURSABLE EXPENSES:** Consultant shall be reimbursed for the following expenses – in accordance with Board and Professional Development Unit policies: transportation and lodging. The total compensation amount reflected herein is inclusive of all reimbursable expenses.

**AUTHORIZATION:** Authorize the General Counsel to include other relevant terms and conditions in the written agreement. Authorize the President and Secretary to execute the agreement. Authorize the Chief Human Resources Officer to execute all ancillary documents required to administer or effectuate this agreement.

**AFFIRMATIVE ACTION:** This contract is in full compliance with the goals required by the Remedial Program for Minority and Women Business Enterprise Contract Participation (M/WBE Program). The M/WBE participation goals for this contract include 25% total MBE and 5% total WBE.

The vendor has identified and scheduled the following firms and percentages:

**Total MBE 25%**

NJW Technology Solutions  
134 N. LaSalle Street, Suite 300  
Chicago, IL 60602

**Total WBE 5%**

Edge Technology Resources, Inc.  
150 N. Michigan Avenue, Suite 2800  
Chicago, IL 60601

**LSC REVIEW:** Local School Council approval is not applicable to this report.

**FINANCIAL:** Charge to the Department of Human Resources: \$2,000,000      Fiscal Year: 2009-2010  
Budget Classification: 11010-499-54125-266410-000000      Source of Funds: Capital Funds

**GENERAL CONDITIONS:**

Inspector General – Each party to the agreement shall acknowledge that, in accordance with 105 ILCS 5/34-13.1, the Inspector General of the Chicago Board of Education has the authority to conduct certain investigations and that the Inspector General shall have access to all information and personnel necessary to conduct those investigations.

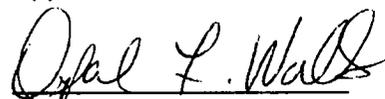
Conflicts – The agreement shall not be legally binding on the Board if entered into in violation of the provisions of 105 ILCS 5/34-21.3 which restricts the employment of or the letting of contracts to, former Board members during the one year period following expiration or other termination of their terms of office.

Indebtedness – The Board's Indebtedness Policy adopted June 26, 1996 (96-0626-PO3), as amended from time to time shall be incorporated into and made a part of the agreement.

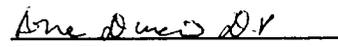
Ethics – The Board's Ethics Code adopted June 23, 2004 (04-0623-PO4), as amended from time to time, shall be incorporated into and made a part of the agreement.

Contingent Liability – The agreement shall contain the clause that any expenditure beyond the current fiscal year is deemed a contingent liability, subject to appropriation in the subsequent fiscal year budget(s).

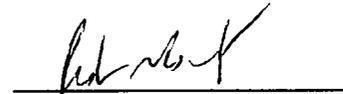
**Approved for Consideration:**

  
Opal L. Walls  
Chief Purchasing Officer

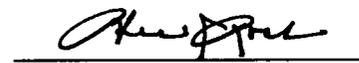
**Approved:**

  
Arne Duncan  
Chief Executive Officer

**Within Appropriation:**

  
Pedro Martinez  
Chief Financial Officer

Approved as to legal form 

  
Patrick J. Rocks  
General Counsel