DAR - Part 7
Software Purchases

Software Purchase Procedures

7.000   Scope of Part
a. This Part establishes regulations for the purchases of District software applications.   This regulation applies to all software purchases for District use. "Software" is defined as the programs or other "instructions" that a computer needs to perform specific tasks. Examples of software include tools such as word processors, e-mail, web browsers, video games, spreadsheets, accounting tools and operating systems, as well as educational programs on computers that can be used to assist in educating users on a specific curriculum.
b. Software purchases, regardless of dollar amount, must be purchased using the processes as outlined and must be coordinated through the Contracting Department. Credit cards and check requests are prohibited means of purchase, unless authorized in writing by the Procurement Office. Simple Software purchases could take several weeks; it may take several months for complex applications. Advance planning may be required to fit the needs of the requirement.
c. These processes are in addition to the Source Selection regulations as outlined in Part 5, Source Selection Procedures.

7.100 Responsibilities
a. Contracting Officer shall:
1. Manage all aspects of the acquisition.
2. Ensure personnel, resources, and time assigned to the source selection reflect the complexity and the needs of the application.
3. Ensure all approvals have been obtained prior to purchase. Necessary approvals may include the IT and Instruction departments; the Superintendent and the Board of Education approvals may be deemed necessary by the specific purchase level.
4. Include all costs of the purchase during negotiations, including additional considerations such as hardware and out-years of support, as part of the discussions.
5. Be responsible for the proper and efficient conduct of the source selection process from identification of need to award of contract.
6. Justify the award to obtain the best value application from offerors at the best price.
7. Ensure all vendors are briefed and sign necessary agreements, or certifications as required.
8. Provide business advice during the solicitation
9. Assist the *Contracting Officer's Technical Representative (COTR)* where needed to ensure the successful implementation of the application.
10. Provide contract management between vendor and users throughout the use of the application.

b. The *COTR*, with assistance of the *CO*, shall:
1. Provide funding allocations for the purchase, as well as the training, maintenance, and any other costs needed during the use of the application (include plans for maintenance costs for future use),
2. Ensure that discussions with offerors, as related to the solicitation, are in the presence of the *CO.*
3. Coordinate authorization for any modifications, or changes to the original contract; working with *CO* and budget authorities for the funding availability.

4. Provide oversight of the implementation of the application, including identifying training requirements and the effective coordination with the Professional Development Department.
5. Include the Assessment Department in program reviews to ensure fidelity of use of the application and that regular measurements of application effectiveness are taken.
6. Continue to manage the application use after implementation, which may include designation of additional sites to receive the application.

7.200 Approval Requirements Prior to Purchase

a. The following approvals are required prior to purchase of any software for District use.
1. Curriculum and Instruction approval must be obtained for any software application that will be used in the instructional process and/or will be used "in the classroom as curriculum". This does not pertain to software applications that are used as *tools*, such as MS Word. The process for Curriculum and Instruction approval is posted on the Curriculum and Instruction website and includes instruction facilitators as well as parents in the review prior to final Board of Education approval.
2. IT Department approvals must be obtained prior to the installation of any software on District information technology resources, which includes administrative servers as well as individual PC's, laptops, wireless equipment, etc. in the classroom or in any District site.
    i. All software approvals are initiated through the District Software License Manager to ensure appropriate protocols are followed during the testing process.
    ii. The District Network Department will check the application for its use of District resources (such as bandwidth usage), and ensure there are no compatibility or usage issues within the existing District applications on the network.
    iii. The Technical Support Services Department will test the application for compatibility with existing District applications on computers as configured.
    iv. The Application Development and Support Services Department will test the application if it requires any data exchanges (to or from) the District databases with regards to movement of student information or other data within the application.
    v. Part of the approval process with the IT Department is to ensure there are appropriate staffing numbers to support the application use, and to identify any additional resources required, which may include hardware (i.e. servers). These costs should be taken into consideration in CO's cost analysis.
3. Department or School Authorities must approve the application for use within their environment.
4. Funding must be identified prior to initiating the Request for Proposal (RFP) or purchase.
    i. A charge code must be determined and approved by the budget officer who is responsible for those funds in that department. The CO will confirm funds are available.
    ii. If the charge code is from a Grant-funded effort, the Grants Office must approve the use and the amount of those particular funds for the period of the effort, prior to purchase.
    iii. Careful consideration is given to the total support costs of the software application which will most likely carry future annual costs over the full period of the application use – examples are subscriptions (yearly renewable), maintenance fees, and hosting costs, as well as training needs and funds for substitute teachers.
5. Contracting Office approval must be in place prior to purchase and installation
    i. The Contracting Officer must ensure that appropriate contract clauses are inserted.
    ii. All End User License Agreement (EULA) terms must be approved and evaluated for fit with the District needs as per the individual application use.

  iii. All terms of the contract must be approved by the CO and conveyed to the end users as well as the supporting staff (CO, COTR, IT support/help desk personnel, etc).

 6. <u>Board of Education</u> approval is ***required*** for all curriculum applications and is initiated with the forms available at the District Instruction website. Additionally, Board of Education (BOE) approval may be required for purchases exceeding the dollar amount set by BOE policy.

7.300 Software / Instructional Materials Approval Form

a. The Software / Instructional Materials Approval (SIMA) form is to be used for all first-time software and subscription purchases for use in the District and must be completed with necessary approvals of the application in place prior to accessing the application or loading the software onto any District resources, or being used by any students or staff.

The following form is a SAMPLE only and the correct current form, with instructions for use of the form, may be found on the Curriculum and Instruction website.

Software / Instructional Materials Approval (SIMA) Form
The Colorado Springs School District No 11 Board of Education

requires **ALL** instructional material requests for purchase, change, or deletion (including "Pilot programs") that are to be used in the classroom to go through an approval process. This process includes a review and approval of the curriculum committee and a citizen's review, and it shall end with a formal approval by the Board of Education. See BOE Policy located at http://www.d11.org/boe/policies/ijj.pdf.

Before completing the following forms, please check:

Is the item: on the approved Instructional Materials list (http://cssd11intra/textbooks/)? ☐ Yes ☐ No

On approved Software list (Call Roberta Emerick, 02968)? ☐ Yes ☐ No

If to be used on District PC/Mac's, has it been reviewed by Tech Services for compatibility?

☐ Yes ☐ No

If product is to be used on the District network, has it been reviewed by Network Services?

☐ Yes ☐ No

If more than one product is to be approved, complete form # 8 for additional items as per the following:

Product Name | Version
Ex: SuccessMaker | Ex: Version 8.5

Publisher | Vendor Contact
Ex: NCS Pearson – McGraw-Hill | Name & number of Rep, if available

Vendor *Technical* Contact, if software product
Name & number (or website for demo)

Is this a new *version* (or new copyright date) of an approved item? ☐ Yes ☐ No
(If this is a request for Adoption of Instructional Materials Copyright Change, Form # 3 must be completed)

Grades covered in product | Grades being purchased
Ex: Grades K-3

Identify Product (Check *all* applicable items):

☐ Textbooks   ☐ Instructional Software   ☐ Textbooks with Software

☐ Online Subscription   ☐ Concurrent use pricing   ☐ Individual use license

☐ Software bundled with Technology equipment   ☐ Admin PC/MAC Software
Ex: Wireless Generation with Palm Pilots   Ex: Word, Microsoft

☐ Assessment tool, online   ☐ Assessment tool, PC load   ☐ Assessment tool, server load

Initial Requestor | Location
Full Name | School/Admin Dept

LTE Review | Print LTE Name:

Supervisor/Principal Approval | Contact

Date product is needed for use by Requestor

Explain Need for this product:

Similar products currently in use in District 11 (for comparison purposes):

Estimate of costs below; attach document(s) (quote/website list/catalog page copy, etc.)

Product purchase price $ Training cost $

If Software Product – to be loaded onto PC/Mac, local servers, or enterprise (D11 network):

Non-recurring Costs:
Software license purchase price $ Individual license price $

Installation / Implementation cost $ Hardware cost $
                                                          (Server, add'l memory, etc)
Recurring Costs:
Software use training fee $ Upgrade cost $

Annual subscription fees $ and/or: Annual support/maintenance fees $

Yearly license renewal fees $

Total estimated cost for this purchase $

Charge Code for Purchase
If this will be a Grant-funded purchase, the Grants Office *must be contacted* to approve the purchase (attach documentation)

Charge Code for continuing yearly support

How will this product be supported? ☐   School ☐   Department ☐ IT (check one)

Projected name of *Administrator* of the program at D11 (user id's, passwords, etc)

Name   Signature

Supervisor's Name   Supervisor's Signature

Projected name of *technical support person* at IT for use – **if not same as above**, obtain approval and get signatures where indicated:

Name   Signature

Supervisor's Name   Supervisor's Signature