

WAKE COUNTY PUBLIC SCHOOL SYSTEM
Contract Routing Form

Person to Call for Pick up: Hollie Aldrige Phone: 919-533-7034

Name of Contract Vendor: Gartner, Inc

Contract Amount: \$285,967.50

Board Action (Required at \$100,000): Yes No Board Meeting Date: 10-18-2016

Budget Code: 02.6110.801.311.0109.0825

Items of Special Note:

FINANCE / ACCOUNTING
OCT 07 2016

**To be completed by the School or Department required for all contracts \$2,500 and up
INITIAL AND DATE THIS FORM AFTER YOU HAVE REVIEWED AND APPROVED THE ATTACHED
CONTRACT:**

	<u>Initial</u>	<u>Date</u>
Administrator (Required)	_____	_____
Leadership Team Supervisor or Area Superintendent (Required \$10,000 and above)	<u>CDL</u>	<u>10/7/16</u>
Chief Officer or Deputy (Required \$100,000 and above)	<u>CDL</u>	<u>10/7/16</u>

To be completed by Administrative Services required for all contracts \$2,500 and up

	<u>Initial</u>	<u>Date</u>
Risk Management	<u>GCB</u>	<u>10/12/16</u>
Required Certification of Funds	<u>H</u>	<u>10/12/16</u>
Finance Officer	<u>H</u>	<u>10/12/16</u>
Chief Operating Officer	<u>SN</u>	<u>10/12/16</u>
School Board Attorney (As required by Chief Officer, Area or Deputy Superintendent)	_____	_____

Comments:



"This instrument has been preaudited in the manner required by the School Budget and Fiscal Control Act." G.S. 115C-441(a).

Handwritten signature/initials: P 10/19/16



WAKE COUNTY PUBLIC SCHOOL SYSTEM
 1551 ROCK QUARRY ROAD
 RALEIGH, NC 27610-4145

PURCHASE ORDER

190903

Page 1 of 1

INVOICE
TO

WAKE COUNTY PUBLIC SCHOOL SYSTEM
ACCOUNTING DEPARTMENT
 110 CORNING ROAD
 CARY, NC 27518

PAYMENT TERMS
 Immediate

PO REVISION
 2

CORRECT PURCHASE ORDER AND STOCK NUMBERS MUST APPEAR ON ALL PACKAGES, INVOICES, SHIPPING PAPERS AND CORRESPONDENCE. PACKING SLIPS MUST ACCOMPANY ALL SHIPMENTS. CONDITIONS AND BILLING INSTRUCTIONS ON REVERSE.

TO

GARTNER GROUP SERVICES INC
 291 BROADWAY 9TH FLOOR
 NEW YORK, NY 10007

SHIP
TO

Academics
 Crossroads I, 5625 Dillard Drive
 Cary, NC 27518

DATE	FOB	FREIGHT TERMS	FOR QUESTIONS REGARDING THIS ORDER CONTACT
04-OCT-16	Destination	Prepaid	Wallace, Debra, dwallace2@wcpss.net 919-588-3470

WCPSS Deliver To Only: Kingsley, Mr. Brian Gerald

Academics (BRIAN KINGSLEY)

LINE	WCPSS ITEM NO	WCPSS ACCOUNT CODE ITEM DESCRIPTION	QTY	UOM	UNIT PRICE	AMOUNT
1		02.6110.801.311.0109.0825.000 SERVICE CONTRACT PER ATTACHED AGREEMENT.	273000	Dollar	1.00	
2	1110111111	02.6110.801.311.0109.0825.000 TAX, SALES - THIS PURCHASE ORDER HAS A TAX ENCUMBRANCE OF ONLY 4.75%. YOUR INVOICE SHOULD REFLECT NC SALES AND USE TAX OF 6.75%. (G) TERM - 10/18/16 - 6/30/17 CURRICULUM STRATEGY AND ROADMAP	12967.5	Each	1.00	

RECEIVER'S SIGNATURE Certifying that the above Goods or services has been received

DATE

PARTIAL

FINAL

BUDGET MANAGER'S SIGNATURE Certifying Receipt and that all regulations set forth by the Finance Manual and Board Policy were followed

DATE

MATERIAL RECEIVING REPORT

**WAKE COUNTY
PUBLIC SCHOOL SYSTEM**

Service Agreement/Contract

Justification/Negotiation Statement

Requestor's Name: Brian Kingsley, Assistant Superintendent of Academics

Vendor's Name: **Gartner, Inc.**

Date: 9/28/2016

Justification (why services are required): Gartner, Inc. is an objective third party and recognized leader in K-12 education transformation. Gartner is uniquely positioned to work with the school system on a more strategic approach to managing and optimizing curriculum resources.

Scope of Services (what is being provided and measurable outcomes): Gartner will provide an assessment of procurement policies and practices, conduct interviews to better understand current purchasing and usage patterns, conduct workshop(s) to define future curriculum management capabilities, document the school system's current state process and capability gaps, assess potential solutions against capability model, define reference architecture; as needed, conduct visioning workshops, define goals, metrics; build, review, iterate and share roadmap with specific initiatives that include costs, timeframes and dependencies and develop communications plan for impacted stakeholders; including the board, community, teachers and administration. This work will be conducted using Gartner's proven methodologies and toolkits, and the findings and recommendations associated with this project will be fact-based, data-driven and informed by current research.

Negotiation (Price/terms negotiated; if bid or quote for services is not the lowest of the three quotes or submitted bids please justify): Gartner has a contract with the State of North Carolina pursuant to the authority to the Office of Information Technology Services for subscription-based research and related services. As such the schools system obtained a statement of work for services.

WAKE COUNTY PUBLIC SCHOOL SYSTEM

This contract (the "Contract") is made and entered into this 18th day of October, 2016, between the Wake County Board of Education (the "School System"), 5625 Dillard Drive, Cary, NC 27518, and Gartner Inc. (the "Provider"), 56 Top Gallant Road, Stamford, CT 06904. For and in consideration of the mutual promises set forth in the Contract the parties do mutually agree as follows:

1. **Obligations and Representations of Parties.** Provider hereby agrees to provide the following services to the School System: subscription-based research and related services in accordance with Exhibit A "The Curriculum Strategy and Roadmap Statement of Work"; hereto incorporated, including the Master Client Agreement and Consulting Services Supplement to the Master Client Agreement referenced therein. The work will be completed in a manner acceptable to the School System and in full compliance with the terms and conditions of this Contract, including any documents incorporated by reference. All agents or employees of Provider who will provide services under this Contract will be fully qualified, possess any requisite licenses, and otherwise be legally entitled to perform the services provided, and shall exercise the skill and care customarily exercised by duly licensed and qualified providers of the same or similar services. The parties acknowledge that the Wake County Board of Education has authorized the Superintendent or his designee to enter into service contracts involving expenditures of up to \$100,000. The parties further acknowledge that the School System may perform all or part of its obligations pursuant to this Contract through the Superintendent or his designee.
2. **Compensation.** The School System hereby agrees to compensate Provider in an amount not to exceed \$273,000 (travel and or subsistence is inclusive of this amount) once all services have been rendered in accordance with the terms of this Contract and the payment schedule set forth in Exhibit A as follows:
 - 2.1. **Gartner will submit invoices for payment as follows:**
 - 25% of the professional fee will be invoiced upon completion of the project kickoff.
 - 25% of the professional fee will be invoiced upon completion of the deliverables defined in Part 1 of the work plan in the Exhibit A "The Curriculum Strategy and Roadmap Statement of Work."
 - 25% of the professional fee will be invoiced upon completion of the deliverables defined in Part 2 of the work plan in the Exhibit A "The Curriculum Strategy and Roadmap Statement of Work."
 - 25% of the professional fee will be invoiced upon completion of the deliverables defined in Part 3 of the work plan in the Exhibit A "The Curriculum Strategy and Roadmap Statement of Work."
3. Provider shall provide School System with a monthly invoice(s) itemized by service provided the number of hours worked and by whom, the date(s) that services were provided, and the amount owed, along with any supporting documentation that may be requested in advance by School System. The School System shall process payments to Provider within forty-five (45) days of submission of such invoice(s).
 - 3.1. In the event of inclement weather, fire, power failure, or other similar occurrence, which may necessitate the cancellation of the delivery of the service(s), and an alternate date cannot be agreed upon, the School System will be under no obligation to compensate Provider for services not rendered.
4. **Contract Funding.** It is understood and agreed between Provider and the School System that the School System's payment obligation under this Contract is contingent upon the availability of appropriated funds from which payment for Contract purposes can be made.
5. **Term.** The services described in this Contract will be provided from 10/18/16 through 6/30/17, unless sooner terminated as herein provided.
6. **Termination for Convenience.** The School System may terminate this Contract at any time at its complete discretion upon ten (10) calendar days' notice in writing from the School System to Provider prior to the date of termination. In addition, all finished or unfinished documents and other materials produced by Provider pursuant to this Contract shall, at the request of the School System, be turned over to it and become its property. If the Contract is terminated by the School System in accordance with this section, the School System will provide a prorated payment for all services performed as of the date of termination.
7. **Insurance.** Provider agrees to maintain Commercial General Liability in amount of \$1,000,000 each occurrence,

\$1,000,000 each occurrence in Personal & Advertising Injury with \$2,000,000 General Aggregate, and \$2,000,000 Products/Completed Operations Aggregate. Provider shall maintain \$1,000,000 in automobile liability, and other appropriate insurance, as well as Workers Compensation in the required statutory amount for all employees participating in the provision of services under this Contract. The Wake County Board of Education shall be named by endorsement as an additional insured on the General and Automobile Liability policies. Certificates of such insurance shall be furnished by Provider to the School System and shall contain an endorsement to provide the School System at least 10 days' written notice of any intent to cancel or terminate by either Provider or the insuring company. Failure to furnish insurance certificates or maintain such insurance shall be a default under this Contract and shall be grounds for immediate termination of this Contract.

8. **Taxes.** Provider shall pay all federal, state and FICA taxes for all employees participating in the provision of services under this Contract.
9. **Monitoring and Auditing.** Provider shall cooperate with the School System, or with any other person or agency as directed by the School System, in monitoring, auditing, or investigating activities related to this Contract. Provider shall permit the School System to evaluate all activities conducted under this contract as dictated by the School System. Provider shall provide auditors retained by the School System with access to any records and files related to the provision of services under this Contract.
10. **Confidentiality of Student Information.** Provider agrees that all student records or personally identifiable information contained in student records that may be obtained in the course of providing services to the School System under this Contract shall be subject to the confidentiality and disclosure provisions of applicable federal and state statutes and regulations as well as the School System's policies. All student records shall be kept in a secure location preventing access by unauthorized individuals. Provider will maintain an access log delineating date, time, agency, and identity of individual accessing student records who is not in the direct employ of Provider. Provider shall not forward to any person other than parent or the School System any student record or personally identifiable information obtained from a student record (including, but not limited to, the student's identity) without the written consent of the School System. Upon termination of this Contract, Provider shall turn over to the School System all student records or personally identifiable information about students obtained by Provider while providing services under this Contract. Nothing in this Contract gives Provider any right to access any student records or personally identifiable information.
11. **Lunsford Act/Criminal Background Check.** Provider also acknowledges that G.S. § 14-208.18 prohibits anyone required to register as a sex offender under Article 27A of Chapter 14 of the General Statutes from knowingly being on the premises of any school. Provider shall conduct or arrange to have conducted, at its own expense, sexual offender registry checks on each of its owners, employees, agents and subcontractors ("contractual personnel") who will engage in any service on or delivery of goods to School System property or at a School System sponsored event, except checks shall not be required for individuals who are solely delivering or picking up equipment, materials, or supplies at: (1) the administrative office or loading dock of a school; (2) non-school sites; (3) schools closed for renovation; or (4) school construction sites. The checks shall include at a minimum checks of the State Sex Offender and Public Protection Registration Program, the State Sexually Violent Predator Registration Program, and the National Sex Offender Registry ("the Registries"). For Provider's convenience only, all of the required registry checks may be completed at no cost by accessing the United States Department of Justice Sex Offender Public Website at <http://www.nsopw.gov>. Provider shall provide certification on the Sexual Offender Registry Check Certification Form, (Attachment A) that the registry checks were conducted on each of its contractual personnel providing services or delivering goods under this Contract prior to the commencement of such services or the delivery of such goods. Provider shall conduct a current initial check of the registries. The sex offender registry checks shall be conducted within 30 days of Provider's execution of the Contract and prior to performing any services on School System property. In addition, Provider agrees to conduct the registry checks and provide a supplemental certification form before any additional contractual personnel are used to deliver goods or provide services pursuant to this Contract. Provider further agrees to conduct annual registry checks of all contractual personnel and provide annual certifications at each anniversary date of this Contract. Provider shall not assign any individual to deliver goods or provide services pursuant to this Contract if said individual appears on any of the listed registries. Provider agrees that it will maintain all records and documents necessary to demonstrate that it has conducted a thorough check of the registries as to each contractual personnel, and agrees to provide such records and documents to the School System upon request. Provider specifically acknowledges that the School System retains the right to audit these records to ensure compliance

with this section at any time in the School System's sole discretion. If requested by the School System, the Provider shall provide sufficient background information regarding any or all contractual personnel who may deliver goods or perform services under this contract in order to allow the school system to perform a criminal background check on each individual at the School System's expense. Provider further agrees that it has an ongoing obligation to provide the School System with the name of any new contractual personnel who may deliver goods or provide services under the Contract. The School System reserves the right to prohibit any contractual personnel of Provider from delivering goods or providing services under this Contract if the School System determines, in its sole discretion, that such contractual personnel may pose a threat to the safety or well-being of students, school personnel or others, or if such contractual personnel may otherwise pose a risk to the School System's operations. Failure to comply with the terms of this provision shall be deemed a material breach of the Contract.

12. **Indemnification.** Provider shall indemnify and hold harmless the School System and its agents and employees from and against all claims, actions, demands, costs, damages, losses, and/or expenses of any kind whatsoever resulting from the willful omission or commission of any negligent act by Provider or its agents and/or employees during the provision of services, including but not limited to court costs and reasonable attorney's fees, incurred in connection with the defense of said matters. The parties agree that this indemnification clause is an "evidence of indebtedness" for purpose of N. C. Gen. Stat. § 6-21.2.
13. **Relationship of Parties.** Provider shall be an independent contractor of the School System, and nothing herein shall be construed as creating a partnership or joint venture; nor shall any employee of Provider be construed as an employee, agent, or principal of the School System. Provider shall not assign, subcontract, or otherwise transfer any interest in this contract without the prior written approval of the School System.
14. **Applicable Laws.** Provider shall comply with all applicable laws and regulations in providing services under this Contract. In particular, Provider shall not employ any individuals to provide services to the School System who are not authorized by federal law to work in the United States. Provider represents and warrants that it is aware of and in compliance with the Immigration Reform and Control Act and North Carolina law (Article 2 of Chapter 64 of the North Carolina General Statutes) requiring use of the E-Verify system for employers who employ twenty-five (25) or more employees and that it is and will remain in compliance with these laws at all times while providing services pursuant to this Contract. Provider shall also ensure that any of its subcontractors (of any tier) will remain in compliance with these laws at all times while providing subcontracted services in connection with this Contract. North Carolina law will govern the interpretation and construction of the Contract. Provider shall comply with the Affordable Care Act and accompanying IRS and Treasury Department regulations.
15. **Compliance with Iran Divestment Act of 2015.** Provider certifies that as of the date of this Contract, Provider is not listed on the Final Divestment List created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. §147-86.58. Provider understands that it is not entitled to any payments whatsoever under this Contract if this certification is false. The individual signing this Contract certifies that he or she is authorized by Provider to make the foregoing statement.
16. **Anti-Nepotism.** Provider warrants that, to the best of its knowledge and in the exercise of due diligence, none of its corporate officers, directors, or trustees and none of its employees who will directly provide services under this Contract are immediate family members of any member of the Wake County Board of Education or of any principal or central office staff administrator employed by the Wake County Board of Education. For purposes of this provision, "immediate family" means spouse, parent, child, brother, sister, grandparent, or grandchild, and includes step, half, and in-law relationships. Should Provider become aware of any family relationship covered by this provision or should such a family relationship arise at any time during the term of this Contract, Provider shall immediately disclose the family relationship in writing to the Superintendent of the Wake County Public School System. Unless formally waived by the Wake County Board of Education, the existence of a family relationship covered by this Contract is grounds for immediate termination by Owner without further financial liability to Provider.
17. **Applicable Wake County Board of Education Policies.** Provider acknowledges that the Wake County Board of Education has adopted policies governing conduct on School System property and agrees to abide by any and all relevant WCPSS policies while on School System property. The Provider acknowledges that it has received copies of and will abide by the following Wake County Board of Education policies:

- Policy 2302: Weapons Prohibited on School Property
 - Policy 2305: Code of Ethics and Standard of Conduct
 - Policy 2306: Drug and Alcohol Testing of Commercial Motor Vehicle Operators
 - Policy 2308: Tobacco-Free Environment
 - Policy 2321: Conduct of Employees Toward Students
 - Policy 3012: Prohibited Conduct on School Property and at School Events
18. **Order of Precedence.** The Parties do hereby agree that in the event of a conflict between the terms of this Contract, the Exhibit A, the Master Client Agreement and Consulting Services Supplement to the Master Client Agreement, the order of precedence shall be as follows: this Contract, the Exhibit A, the Consulting Services Supplement to the Master Client Agreement, and the Master Client Agreement.
19. **Entire Agreement.** This Contract may be amended only by written amendments duly executed by and between the School System and Provider. This Contract, including the purchase order, if any, used in connection herewith and any other document(s) expressly incorporated by reference as a part of this Contract, constitutes and expresses the entire agreement and understanding between the parties concerning its subject matter. This Contract supersedes all prior and contemporaneous discussions, promises, representations, agreements and understandings relative to the subject matter of this contract. To the extent there may be any conflict between the four corners of this Contract and other documents incorporated by reference herein, the terms of this Contract will control. If any provision of this Contract shall be declared invalid or unenforceable, the remainder of the Contract shall continue in full force and effect.
20. **Counterparts and Execution.** This Contract may be executed in any number of counterparts, each of which will be deemed an original but all of which together will constitute one and the same instrument. The Parties agree that computer scanned and/or faxed signatures or copies of this Contract will have the same validity and force as an "original."
21. **Authority to Enter Contract.** The person(s) executing this Contract on behalf of Provider have authority to do so as an official, binding act of Provider.

IN WITNESS WHEREOF, the parties have hereunto set their hands and seals the day and year first indicated above.

WAKE COUNTY BOARD OF EDUCATION

GARTNER, INC.

Thomas C. Benton, Board Chair Date

CEO/President Date

02.6110.801.311.0109.0825

Budget Code

Curriculum Strategy and Roadmap

Statement of Work

October 9, 2016



**WAKE COUNTY
PUBLIC SCHOOL SYSTEM**

GARTNER CONSULTING

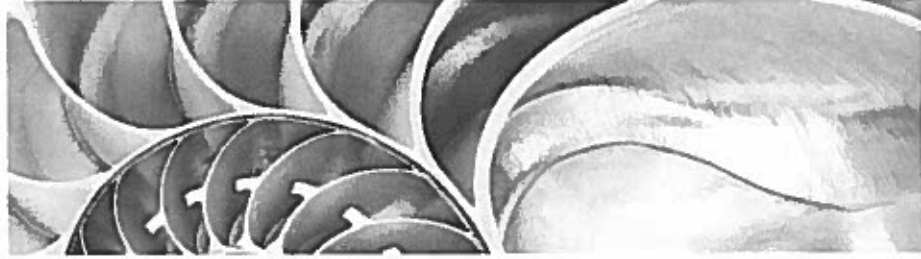
Wake County Board of Education | Project # 330032364
October 09, 2016 | Version # 2

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Gartner.

Our Understanding & Business Context

- Wake County Board of Education is the local governing body of the Wake County Public School System (WCPSS) and is the largest school district in North Carolina with more than 157,000 students, 171 schools and almost 19,000 employees (more than 10,000 teachers).
- WCPSS recently completed their strategic plan, Vision 2020, with a noble goal of graduating 95% of students ready for productive citizenship and career or college readiness.
- WCPSS is suffering from a “silo’ed” approach to managing curriculum materials, with multiple procurement vehicles available to a diverse set of stakeholders. Rather than units and lessons “written to the middle,” WCPSS would also like to cultivate a future state “marketplace” of content and resources to better align with its stakeholders’ diverse, individual needs.
- As an objective third party and recognized leader in K-12 education transformation, Gartner is uniquely positioned to work with the WCPSS on a more strategic approach to managing and optimizing curriculum resources.
- This work will be conducted using Gartner’s proven methodologies and toolkits, and the findings and recommendations associated with this project will be fact-based, data-driven and informed by current research.



Approach Overview

Assess Procurement Processes



- Analyze and review current procurement processes, policies and technology (both district and state)
- Analyze curriculum spending patterns, including central and school instructional resource allocations
- Survey schools (teachers/principals) on procurement practices
- **Deliverable:** Assessment of procurement policies and practices

Identify Opportunities



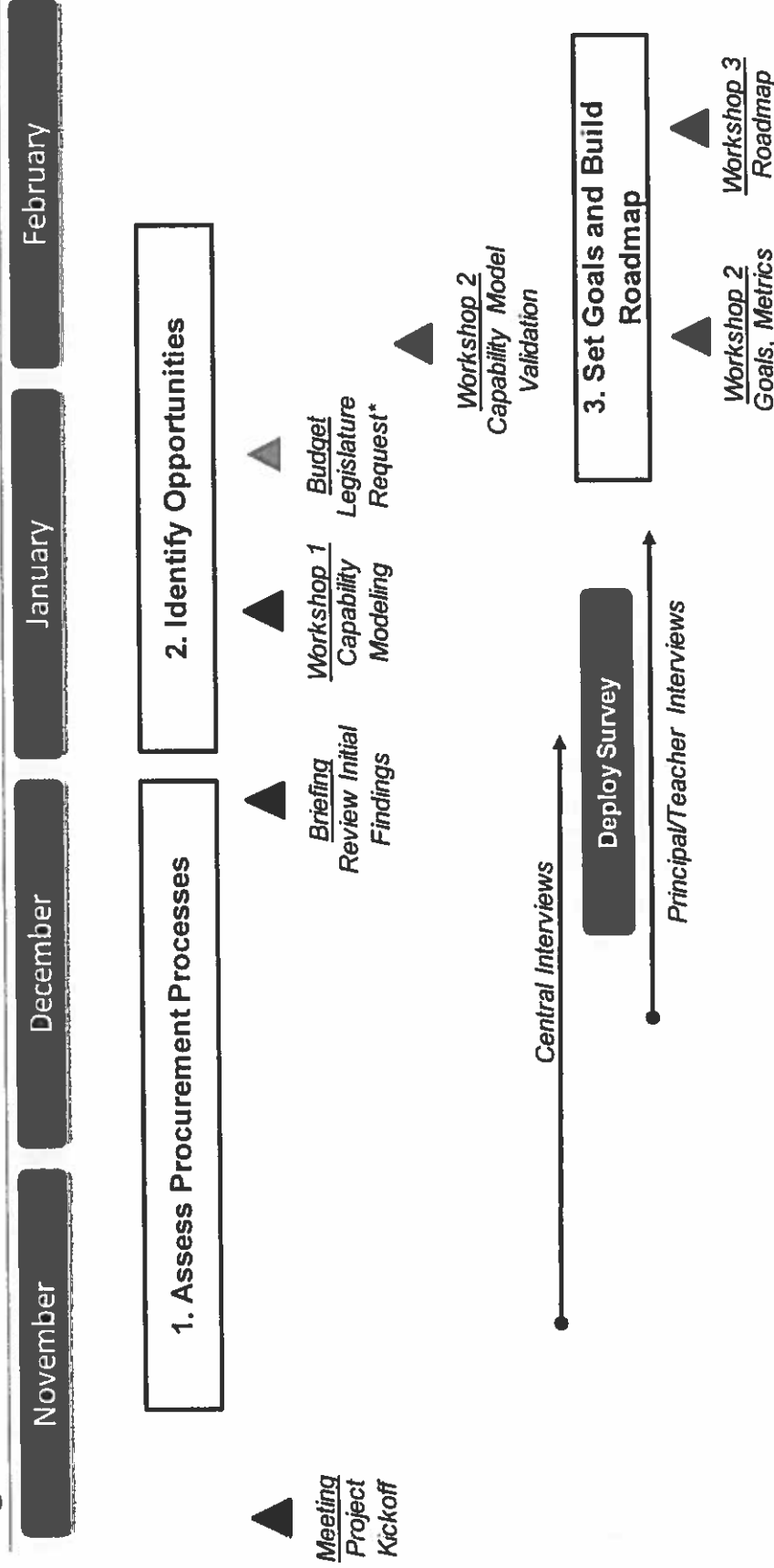
- Conduct interviews to better understand current purchasing and usage patterns
- Conduct workshop(s) to define future curriculum management capabilities
- Document WCPSS current state process / capability gaps
- Assess potential solutions against capability model
- Define reference architecture as needed
- **Deliverable:** WCPSS Curriculum Capability Model

Set Goals and Build Roadmap



- Conduct visioning workshops
- Define goals, metrics
- Build, review, iterate and share roadmap with specific initiatives that include costs, timeframes and dependencies
- Develop communications plan for impacted stakeholders (board, community, teachers, administration)
- **Deliverable:** Strategic Plan and Implementation Roadmap

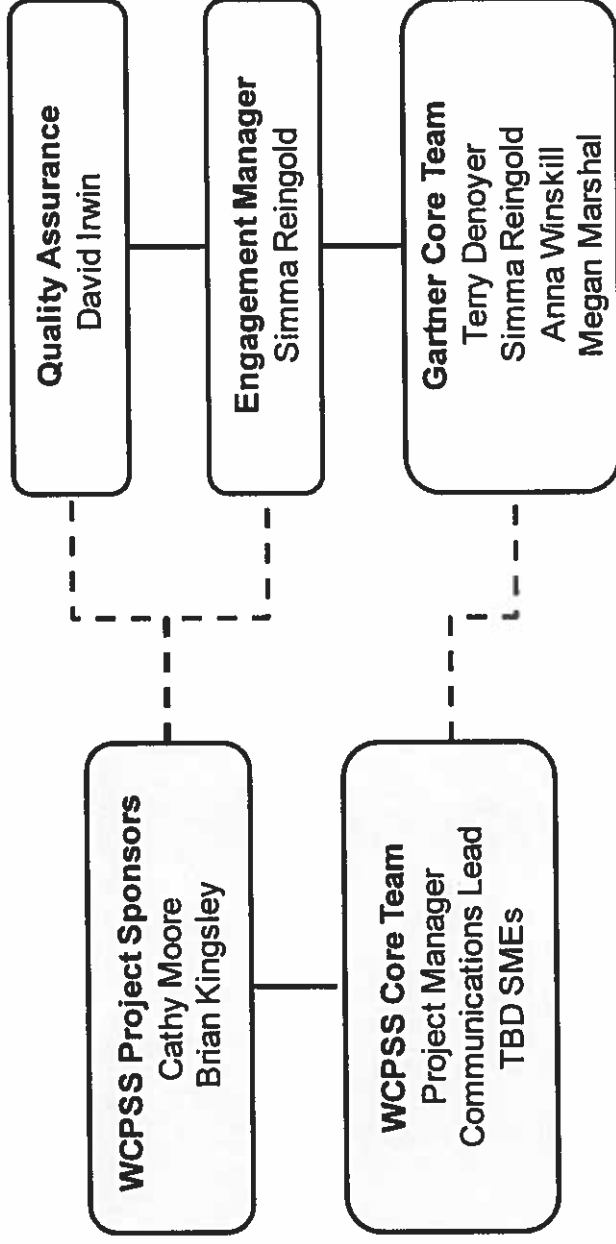
High Level Schedule



*as necessary / as determined by capability needs

Gartner Project Team Organization

Gartner has created an organization structure for this engagement that ensures high-level sponsorship and quality assurance, strong day-to-day project management, a focused team of project consultants, and deep subject matter expertise.



Detailed Approach

Detailed Approach

Part 1: Assess Procurement Processes



A. Project Kickoff

Gartner Responsibilities

- Define core working team
- Plan and conduct kickoff meeting to:
 - Ensure mutual understanding of objectives, scope, schedule and responsibilities
 - Ensure Gartner team understanding of WCPSS vision and strategy, including review of all available Vision 2020-related documents
- Develop talking points and presentation to be used to by WCPSS to communicate the intended outcomes for this initiative.

WCPSS Responsibilities

- Participate in kickoff meeting
- Coordinate WCPSS attendees to attend kickoff

Gartner Deliverables

- Kickoff Materials
- Interview Guides
- Communications presentation/talking points for CAO that convey intended outcomes of project for district leadership

Timeline

- 1 week

Detailed Approach

Part 1: Assess Procurement Processes



B. Understand Landscape & Existing Activities

Gartner Responsibilities

- Review any current documentation on WCPSS procurement processes, spending analyses, materials adoption processes, materials development, instructional resource allocations, content inventories, content repositories, open resources quality reviews, curriculum development policy(s), curriculum QA or QC processes, etc.
- Conduct interviews to understand current processes, historical context, potential opportunities, needs, risks, goals
- Assess current state of instructional resource allocations (e.g. \$0.71/student) at the school level (given available data)
- Determine current stakeholder challenges, opportunities
- Develop hypotheses, and draft survey to principals, teachers, central staff
- Issue survey and collect data

Gartner Deliverables

- Stakeholder analysis (survey)
- Assessment of procurement policies and practices

WCPSS Responsibilities

- Provide access to relevant materials
- Coordinate and schedule interviews with appropriate WCPSS staff, roles
- Build and share survey distribution list
- Review deliverables and provide feedback

Timeline

- 4-5 weeks

Detailed Approach

Part 2: Identify Opportunities



A. Compile Opportunities and Potential Capabilities

Gartner Responsibilities

- Conduct interviews with Principals and other school staff to understand how school-based decisions are made, the current environment, and discuss potential opportunities
- Review and test hypotheses with Principals
- Review survey data, and validate or further identify opportunities to improve curriculum management practices
- Identify and summarize WCPSS student survey(s) as available
- Document a running list of potential curriculum capabilities for WCPSS as input into capability modeling

WCPSS Responsibilities

- Identify principals to interview
- Coordinate scheduling of interviews

Gartner Deliverables

- Data collection and draft capabilities to inform next phase

Timeline

- 2-4 weeks

Detailed Approach

Part 2: Identify Opportunities



B. Collaboratively Develop WCPSS Curriculum Capability Model

Gartner Responsibilities

- Draft workshop agendas and 'run of show'
- Support identification of workshop attendees and scheduling
- Prepare workshop materials
- Conduct initial modeling workshop with WCPSS staff
- Draft initial capability model and review with stakeholders
- Conduct review workshop to gather feedback and iterate
- Communicate WCPSS Curriculum Capability Model as necessary
- Assess potential solutions for alignment with capability model and develop solution architecture as necessary

WCPSS Responsibilities

- Identify workshop attendees
- Coordinate and schedule workshops
- Review deliverables and provide feedback on capability model
- Coordinate communications

Gartner Deliverables

- Workshop materials
- WCPSS Curriculum Capability Model

Timeline

- 2-3 weeks

Detailed Approach

Part 3: Set Goals and Build Roadmap



A. Future State Process Visioning

Gartner Responsibilities

- Document WCPSS current state against capability model and review with stakeholders
- Based on capability model, current state and opportunities, draft and review goals of Academic Achievement in regards to curriculum management
- Conduct workshop to discuss and ideate on goals and metrics
- Capture and iterate on goals and metrics as developed by workshop attendees
- Draft initial roadmap structure and key components
- Support budget request process as appropriate (Oct.) to develop high level business case for new roles/tools/etc. to enable future capabilities

WCPSS Responsibilities

- Identify workshop participants
- Coordinate and schedule workshop
- Provide feedback and input to deliverables

Gartner Deliverables

- WCPSS Current State Capabilities
- Draft Curriculum Management goals and metrics
- Budget request support as necessary

Timeline

- 2 weeks

Detailed Approach

Part 3: Set Goals and Build Roadmap



B. Review and Communicate Roadmap

Gartner Responsibilities

- Draft Strategic Plan and Implementation Roadmap document
- Draft individual initiatives and roadmap sequencing
- Conduct workshop to review, discuss and refine roadmap
- Develop high level communications plan; Determine what is to be communicated, messaging, and to whom
- Finalize Strategic Plan and Implementation Roadmap
- Support communications team in implementing communications plan as necessary

WCPSS Responsibilities

- Identify workshop participants
- Coordinate and schedule workshop
- Provide feedback and input to deliverables

Gartner Deliverables

- Workshop materials
- Strategic Plan and Implementation Roadmap

Timeline

- 2-3 weeks

Gartner Roles and Responsibilities

Gartner Associate	Role	Responsibilities
David Irwin	Quality Assurance	<ul style="list-style-type: none"> ■ Ensure that Gartner activities support WCPSS goals ■ Build and maintain a long-standing relationship with WCPSS ■ Provide high-level oversight to the project and become more heavily involved should any issue resolution be necessary
Simma Reingold	Engagement Manager	<ul style="list-style-type: none"> ■ Responsible for the day-to-day management of project initiatives ■ Ensure that project deliverables are completed on time and meet the Gartner quality standards ■ Act as the primary point of contact for the Gartner team ■ Work closely with WCPSS to ensure that Gartner is meeting its needs
Terry Denoyer Megan Marshall Anna Winskill Others, TBD	Subject Matter Experts	<ul style="list-style-type: none"> ■ Support the core project team by providing subject matter expertise as needed throughout the engagement ■ Participate in deliverable creation, deliverable review and client presentations as needed

Assumptions – WCPSS Participation

The deliverables, schedule and pricing in this proposal are based on the following assumptions:

WCPSS Participation

- WCPSS will assign a senior-level project sponsor that will be influential in ensuring that project stakeholders across different WCPSS colleges, schools and departments participate in project activities as detailed in this statement of work.
- WCPSS will designate a project manager to act as the primary point of contact for this project. The WCPSS project manager will be expected to work closely with the Gartner employees as needed and will:
 - (a) approve project priorities, detailed task plans and schedules;
 - (b) facilitate the scheduling of Gartner interviews with appropriate client personnel;
 - (c) notify Gartner in writing of any project or performance issues; and
 - (d) assist in resolving project issues that may arise.
- The work effort described in this proposal assumes that WCPSS personnel are available to assist in the project as defined in this Proposal. In the event that WCPSS personnel are not available, a change of scope may be necessary.
- The level of detail (i.e., order of magnitude cost estimates) and quality of deliverables will be dependent on the information provided by WCPSS within the available time for the project.
- WCPSS will review and approve documents within five business days. If no formal approval or rejection is received within that time, and as a direct result of the delay the Project schedule extends or Gartner incurs documented additional costs, WCPSS and Gartner will negotiate a mutually agreeable change order to account for such schedule change and/or additional costs.
- WCPSS is to schedule WCPSS resources for project activities and provide meeting facilities as necessary.
- WCPSS personnel will be made available per the final project schedule.

Assumptions

Data Collection and Key Personnel

Data Collection

- The due diligence (as-is) data are reasonably available via interviews and documentation review.
- WCPSS will provide timely access to all appropriate personnel to be interviewed. These personnel will have the ability to provide data necessary to complete this project, answer questions, provide existing documentation and attend working sessions.
- Project pricing assumes that Gartner will conduct interviews and workshops as detailed in the statement of work at WCPSS and that WCPSS will arrange all sessions with WCPSS personnel.
- WCPSS will be responsible for identifying and establishing the evaluation team and the steering committee.
- Project pricing assumes that Gartner will conduct workshops as described in this statement of work during the engagement and that WCPSS will arrange all sessions with WCPSS personnel.
- All data collection and interviews/workshops will take place via telephone or in person at location as described in this proposal and/or as agreed to at the project kickoff.

Key Personnel

- Resumes of key personnel provided in this proposal assume a project start date of August 15, 2016. If the actual project start date is different, proposed individuals may not be available. In this event, we will work with WCPSS to identify alternative personnel with appropriate skills and background.

Assumptions

Place of Performance, Deliverables and Changes to Scope

Place of Performance

- With the exception of interviews and workshops, Gartner work will be performed at Gartner locations.
- All workshops and meetings are detailed on each of the project tasks of this SOW.
- Office space, telephones and access to the open Internet will be made available to Gartner staff at WCPSS locations for onsite project time.
- Gartner will have access to printing/copying services at WCPSS locations.

Deliverables and Changes to Scope

- Any requests for additional information (beyond the details described in the tasks above) that are made by WCPSS will be considered a change in scope for this engagement and will be handled accordingly (see Changes to Scope section of this proposal).
- All deliverables will be developed using Microsoft products (for example, Project, Excel, Word and PowerPoint).

Investment Summary and Authorization

Investment Summary and Invoicing

- Based on the scope described in this SOW, Gartner's fixed professional fee is \$273,000 and is exclusive of all applicable taxes.
- Travel and other project related expenses are included in our fees.
- Gartner will submit invoices for payment as follows:
 - 25% of the professional fee will be invoiced upon completion of the project kickoff.
 - 25% of the professional fee will be invoiced upon completion of the deliverables defined in Part 1 of the work plan in this SOW
 - 25% of the professional fee will be invoiced upon completion of the deliverables defined in Part 2 of the work plan in this SOW
 - 25% of the professional fee will be invoiced upon completion of the deliverables defined in Part 3 of the work plan in this SOW
- All professional fees and project expenses will be invoiced and paid in \$US Dollars.
- Invoices are payable 30 days from the date of invoice
- While we do not itemize billing for professional services, we agree and will comply with any reasonable requests for records substantiating our invoices
- If WCPSS requires a purchase order (PO) number, please specify the PO number in the Authorization section and forward a copy of the PO, with this agreement, to name/address or fax of appropriate individual. Ensure that the PO includes all labor and travel expenses quoted in this Statement of Work. Any pre-printed terms on the PO that are in addition to or in contradiction of the terms of this agreement shall be inapplicable.

Investment Summary and Invoicing

- Gartner's cost estimate is both reasonable and realistic. Our rates are reasonable for the following reasons:
 - Gartner's consulting staff rely heavily on Gartner's research. Our consultants utilize the research in a variety of ways, including leveraging the content directly and including it in Gartner deliverables. Consultants will also have the analysts participate directly by reviewing deliverables or taking part in the project directly. Each use of research provides significant value, and comes with a real opportunity cost. This resource is built into our hourly rates.
 - Gartner comes to the table with a complete set of tools and templates developed through prior engagements and applied subject matter expertise. This enables more-effective use of resources by both Gartner and Andover, which results in fewer hours required to complete tasks and deliverables and less risk of rework or wasted effort.
 - Gartner does not charge for administrative, contracts management or deliverable production. All of those associated costs are built into our labor rates. In other words, our administrative and secretarial personnel, our contracts management personnel, and our editors, graphics and production staff are all funded from overhead. These activities contribute to the hourly rates charged.
 - Gartner is a senior-leveraged practice. Our rates reflect the heightened level of experience of our associates. The value of Gartner's senior-leveraged practice is typically realized through greater engagement team efficiency.

Changes to Scope

- The scope of this engagement is defined by this Statement of Work. All WCPSS requests for changes to the SOW must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise WCPSS of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to decide whether to proceed with the requested changes. The parties shall agree in writing upon any requested changes prior to Gartner commencing work.
- As used herein, “changes” are defined as work activities or work products not originally planned for or specifically defined by this SOW. By way of example and not limitation, changes include the following:
 - Any activities not specifically set forth in this SOW
 - Providing or developing any deliverables not specifically set forth in this SOW
 - Any change in the respective responsibilities of Gartner and WCPSS set forth in this SOW, including any reallocation or any changes in engagement or project manager staffing
 - Any rework of completed activities or accepted deliverables
 - Any investigative work to determine the cost or other impact of changes requested by WCPSS
 - Any additional work caused by a change in the assumptions set forth in this SOW
 - Any delays in deliverable caused by a modification to the acceptance criteria set forth in this SOW
 - Any changes requiring additional research analyst time or changes to research analyst resources

Authorization

This Statement of Work is submitted subject to the terms and conditions of Master Client Agreement between Gartner Inc. and the State of North Carolina, pursuant to the authority of the Office of Information Technology Services (OITS) with an effective date of July 1, 2015 and the Consulting Services Supplement to the Master Client Agreement attached hereto as Attachment 1. The contents of this Statement of Work, together along with the referenced contract terms and conditions contained herein constitute the contractual relationship between the parties with respect to this engagement. By signing below, Wake County Public School System agrees these terms. This Statement of Work may be modified at anytime provided such changes are agreed by the parties in writing.

SUBMITTED ON BEHALF OF GARTNER, INC.



SIGNATURE

David Irwin, Managing Partner, Education Practice

PRINT NAME AND TITLE

October 9, 2016

DATE

AGREED ON BEHALF OF WAKE COUNTY BOARD OF EDUCATION

SIGNATURE

PRINT NAME AND TITLE

DATE

PO NUMBER (if applicable)

Statement of Work Validity Period and Further Assurances

- The Proposal, including the Statement of Work, is valid for 60 days from October 09, 2016.
- Gartner Research and Consulting recommendations are produced independently by the Company's analysts and consultants, respectively, without the influence, review or approval of outside investors, shareholders or directors. For further information on the independence and integrity of Gartner Research, see "[Guiding Principles on Independence and Objectivity](#)" on our Web site, www.gartner.com or contact the Office of the Ombudsman at ombudsman@gartner.com or +1 203 316 3334.

Attachments

Project Team Biographies

Project Team Biographies

David Irwin, Quality Assurance



David Irwin joined Gartner in 2003 and currently leads Gartner Consulting K-12 Education Practice. David has worked with both K-12 school districts and K-12 education technology providers for more than 10 years helping them to solve their toughest business problems. David's representative experience includes:

- For Houston Independent School District (TX), Lake County Schools (FL) and Pinellas County Schools (FL) led a team that developed personalized learning strategy and roadmap to transform teaching and learning at each of these districts.
- For Broward County Schools (FL), developed a district-wide IT strategy and roadmap in order to ready the district to support next gen teaching and learning.
- For the State of Louisiana Department of Education led a team that developed a state-wide IT strategy and roadmap in order to ready the state to support next gen teaching and learning in each of their 69 districts and charter management organizations.
- For Fulton County Schools (GA), led several initiatives including provided a strategic assessment of their technology plan that led to voter referendum and approval of a 5 year \$250 million technology plan, developed a strategy and roadmap for personalized learning and oversaw the implementation of their instructional improvement system.
- For the New York City Department of Education, serve as the engagement manager on a project that provided PM/QA services for the implementation of a \$80 million special education student information system used by more than 160,000 users (more than 10,000 daily).
- For Leander Independent School District (Austin, TX) led a team that helped develop a business case and roadmap for the replacement of administrative and instructional systems
- Led a team that performed an applications portfolio assessment (APM) for the province of Alberta, Canada's Ministry of Education in support of their goal of implementing a competency-based learning system.
- For the New York City Department of Education, led a team that oversaw the implementation of a blended learning initiative to 250 schools (largest in the US) that included a learning management system platform and 21 content providers to provide District-wide blended learning, credit recovery and distant learning for district students.
- For the Twin Towers Fund (at the direction of Mayor Giuliani) served as the project manager on an engagement that created policies and procedures, business and technical requirements, and developed an application to aid in the administration (record, data enter, deposit, and process) of over 220,000 individual donations that totaled over \$150 million. Additionally, created business processes for administering the distribution of \$48 million in funds to 406 families.

David holds a Master of Public Administration degree from New York University and a Bachelor of Arts degree from Hobart and William Smith Colleges. Mr. Irwin is a certified Project Management Professional (PMP)

Project Team Biographies

Simma Reingold, Engagement Manager



Simma works collaboratively with her clients, educating and empowering them to envision how digital design and technology can transform the status quo. She applies her experiences with organization strategy, enterprise software implementations and optimizations, change management, business process redesign, analytics development, and program management to help clients improve communications, performance & outcomes.

Simma has successfully led teams in the following engagement areas:

- *Digital Design:* A relentless focus on how customers / employees / users interact with technology. Simma observes users to develop design oriented deliverables, such as personas and journey maps, that enable client teams to internalize implicit requirements and design solutions from the perspective of a target audience. These engagements have clarified typically complicated sourcing, procurement and implementation processes for Student Information and Learning Management Solutions at some of the largest districts in the US.
- *Business Capability Modeling:* Incorporates principles of enterprise architecture to help organizations bridge the gap between strategy and execution. Simma builds capability models to articulate what capabilities an organization needs in order to support a vision / transformation. These straightforward models enable focused future-state conversations across business and technology stakeholders to clarify gaps in technology, organization, process and infrastructure.
- *Enterprise Information Management and Enterprise Analytics Strategy:* Leverages Gartner's proven frameworks and maturity models to assess current data management and analytic capabilities, Simma encourages clients to design future state programs that are explicitly linked to organizational strategies and business concerns. These engagements culminate in an actionable roadmap to bridge gaps and mature analytic programs, with far reaching technical, operational, financial, and strategic benefits for leading health systems.

Simma started her career in implementation services at Epic, a leading healthcare software company. She then joined PricewaterhouseCoopers' Health Information Technology practice to expand beyond Epic by designing and optimizing the full suite of business, clinical, and revenue cycle applications across leading healthcare technology vendors. She gained experience with large program & project management, vendor selections, IT due diligence reviews, and end-user testing and validation processes. Simma holds the following academic degrees:

- MHA, Cornell University, Ithaca, NY
- BS, Policy Analysis and Management, Cornell University, Ithaca, NY

Project Team Biographies

Terry Denoyer, Subject Matter Expert



Terry Denoyer has been with Gartner since 2006. As an Associate Director, Terry has led and supported a number of recent K-12 projects at the district, state and provincial levels. Mr. Denoyer holds a Computer Information Systems degree and is a Certified Usability Analyst (CUA). Representative work includes:

- For the Bill and Melinda Gates Foundation, providing advisory services to six K-12 school districts (CA, FL(2), GA, CO, TX) aiming to personalize learning for all students system-wide. Worked closely with school and district personnel to conduct current state assessments and craft actionable strategic plans.
- For Houston Independent School District (TX), collaborated with Academics staff to craft a digital curriculum strategy for the district to transition away from textbooks and towards digital resources.
- For Austin Integrated School District (AISD), supported the District Technology Planning Committee in the development of a strategic plan for integrating technology with learning.
- For the State of Louisiana Department of Education(La DOE), supported a strategic planning effort to define the goals and initiatives to undertake in providing technology services to local districts.
- For Fulton County Schools (GA) conducted a K-12 landscape analysis of personalized learning in North America, assessed the district's current state capabilities, and collaborated with district staff on the development of a business case and roadmap to implement personalized learning system-wide.
- For an e-learning company, developed a market scan and roadmap for the client's product management teams in the area of web/app accessibility. Conducted interviews and workshops with product/UX/technical staff to understand current methods, and crafted a roadmap of initiatives to make all products accessible.
- For Fulton County Schools (GA), supported the oversight and risk management services for the implementation of an instructional improvement system
- For the New York City Department of Education (NY), provided oversight and project management services in the implementation of a Special Education Student Information System across 1600+ schools.
- For the New York City Department of Education (NY), provided oversight and risk management services for the implementation of a blended learning platform in 200+ schools.
- For the Ministry of Education in Alberta, Canada, conducted an applications rationalization (portfolio management) assessment, developed a competency-based learning conceptual architecture (technology), and developed a strategic plan and roadmap for the Ministry.
- Additional client work performed for the NYC Department of Homeless Services, NYC Department of Buildings, NYC Department of Correction, US Centers for Disease Control and Prevention, US Agency for Toxic Substances and Disease Registry, US Internal Revenue Service, US Food and Nutrition Service

Project Team Biographies

Megan Marshall, Subject Matter Expert



Megan Marshall is a senior consultant based in New York City with 10 years of experience across strategy, organizational change management, program and project management. Mrs. Marshall joined Gartner Consulting in 2013. A sample of recent professional experience includes:

- Organizational Change Management and Organizational Design:
 - Led the change management effort for a higher education institution implementing shared services, including communications strategy and execution, stakeholder analysis and engagement and organizational readiness.
 - Conducted a workforce transition program including assessing skills and competencies to achieve a target state.
 - Led the change management PM/QA work stream for a large city agency implementation.
 - Supported development of strategic recommendations to address critical technology deficiencies in a state school system, including change management and professional development to support implementation and reinforce goals.
- IT Strategy and Sourcing, Public Sector:
 - For a retirement organization, supported a system modernization program including business and IT strategy development.
 - For a federal energy regulatory agency, supported solution planning for a modernized system replacement by creating harmonized functional business processes and requirements across two distinct business units to reduce solution complexity; documented business rules and identified common infrastructure and data elements.
 - For a city agency, helped develop digital workplace strategies and implementation roadmaps by issuing end user surveys, creating user profiles and evaluating workplace end user computing requirements
 - For a city agency, developed a scope of services for a web content management platform and website redesign effort.

Prior to joining Gartner, Mrs. Marshall worked with an energy policy research and data company. Mrs. Marshall has a background in marketing, public relations and corporate and crisis communications, where she has worked with clients in the energy, financial services, education, media and consumer packaged goods industries. Mrs. Marshall has an MBA from University of San Francisco and a BA in international affairs from George Washington University.

Project Team Biographies

Anna Wmskill, Subject Matter Expert



- Anna Wmskill is a consultant with over eight years of industry experience in healthcare and education. Prior to joining Gartner, Miss Wmskill worked as a teacher with both adolescent and adult learners in a number of school districts in Germany, Ireland and the US. She has been published in *The Times'* education magazine discussing best practices in foreign language learning. She has additional industry experience in healthcare and government, working with legislators in both the European Parliament and Connecticut General Assembly.
- For a state school district, supporting the development of a Personalized Learning Strategy to reinforce educational goals in over thirty schools. This District had heavily invested in technology for its classrooms, without the strategy to support its staff for its use. Helped design a roadmap with a large component detailing Professional Development gaps and specific solutions needed to close those education gaps throughout the District's schools.
- For a state school district, supported the vendor procurement of a Learning Management System to be launched in more than three hundred schools. Helped develop a weighted framework to evaluate each vendors' offerings, beginning with seventy vendors before focusing on a final three. The Learning Management Systems were evaluated to support internal teacher and staff training needs, in addition to student learning needs.
- For a State government agency, helped develop an overall Org Change Management strategy during the deployment of the agency's new web-based system. Developed and led an 8-week training program for sixty department employees and over sixty external agency partners.
- For a large private research University, developed an onboarding training course for IT staff and contractors. This training course followed a large organizational restructuring and addressed the needs of both existing and new employees. The course spanned four days and includes modules on IT infrastructure and operations at the University, department functions, teamwork skills, and customer service.
- Miss Wmskill is fluent in French, with intermediate German. Her functional roles include client management, marketing, corporate finance and research. Miss Wmskill holds a bachelor's degree, with Honors, in Government and French from Wesleyan University. She earned a Higher Diploma in Education, with first class Honors, from Trinity College, Dublin, and received her MBA from Fordham University.

Gartner Contacts

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GARTNER CONSULTING

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