REQUEST FOR PROPOSAL (RFP)
BLUE VALLEY UNIFIED SCHOOL DISTRICT NO. 229

RFP # 20014

For: Copier and Smart Laser Printer Services
Date Released: December 4th, 2019

EXHIBIT – D TRAINING PLAN

Minimum Training Expectations

This training information is provided to detail a minimum level of expectation. The district welcomes enhancements to this plan that will help insure the overall success and satisfaction of the program. The district retains the right to consider any or all of the training improvements proposed in addition to those outlined in this document.

I. INFRASTRUCTURE TESTING, SETUP, TRAINING & SUPPORT
   A. Upon award the successful vendor is expected to make available immediately a smart laser printer and copier from each fleet product family proposed and the necessary analyst support to setup a live test environment to create a custom setup that is acceptable to the District to be mirrored on other machines and used in the training materials.

   B. Vendor is also expected to immediately upon award begin work with the District to outline the necessary steps to setup the print environment and software solutions necessary to support the test copiers and the full copier installation. Vendor may need to seek permission to setup a new instance of the “Accounting Solution” for setup and testing of the new solution until the cutover date.

   C. Vendor is expected to be the subject matter expert on all software and print drivers provided and be able to articulate the Information Technology Resources Necessary to operate, train and promote their use to both technical and non-technical users throughout the life of the agreement.

   D. Detailed architecture plans for all systems and the necessary communication details and account information to be provided to the District along with a concise list of questions to the district related to configuration information. Keep in mind that the District is looking to this partnership to be as self sufficient as possible in regards to technical support.

II. BUILDING / DEPARTMENT COPIER PROGRAM WEB SITE
   A. An Intranet website is dedicated to providing information including the resources called out in this document to District staff.

   B. Vendor is expected to take the lead on presenting information to the District in an organized fashion to consider posting on this site. The District has the right to review, edit and modify any content before posting.

   C. The online resource should be leveraged not only at start-up but throughout the term of the agreement to be a communication tool, especially a resource for “Key Operators”.

   D. The current site can looks like:
The District is open to leveraging this space to better provide information to District staff on capabilities, best practices, initiatives and general communication related to this program. The expectation is that the proposer will efficiently provide all content for consideration and District staff will build the Web pages.

III. METHODS OF DELIVERING TRAINING

A. **Online Step-By-Step Documents** (Provided in both MS Word & PDF Format)

The intent of these documents is to be specific to equipment model, be short in length and clearly communicate the information to a novice user. Images may be helpful for some topics. Some topics will require multiple documents for all the models or may need to be broken out into separate documents to keep concise.

The following document topics must be provided (listed in random order and not intended to be an exact or complete listing, but rather to give an idea of the necessary topics):

1. How to self-register or update proximity card (if a chosen option)
2. How to login on copier or smart laser printer
3. Keypad Functions
4. Scanning to email
5. Scan to file in cloud storage (w/options)
6. How to Print to Follow-You using Universal Drivers (PC/Mac/Google/iOS) (w/advanced driver options), How Follow-You works and how to release on devices.
7. Printer Basics (Common Push Button Instructions)
8. Copier Basics (Common Push Button Instructions)
9. Copier Advanced
10. How to copy/print onto Transparencies and Card Stock
11. Jam clearing instructions by product family
12. How to load paper and general paper handling instructions
13. How to change toner
14. How to load staples
15. Waste toner bottle replacement
16. Changing other operator replaceable components
17. How to power on and off
18. Request Service / Service Escalation
19. Request Training
20. What to do with replaced or empty consumables
21. Directions on any optional applications

B. Quick Start Signs Posted Above Each Fleet Copier and Smart Laser Printer
An 11 x 17 laminated or polyester document should be developed as a quick start
guide covering the basic instructions for copier use. These signs should be posted at
the time of install and should include a minimum of the following instructions:
   1. Basic Copy Features (Green Button Instructions and how to staple, duplex and
collate. Hybrid machines may want to say how to select color for copying.)
   2. How to login (basic / advanced features)
   3. How to request service of training
   4. Web address of additional training materials

C. Jam Clearance Signs Posted Above Each Fleet Copier (Not required at Smart Laser
Printers)
An 11 x 17 or larger poster laminated or on polyester may need be developed as a
reference for proper procedures for clearing jams on the copier fleet. During
implementation or later in the agreement the District may request these signs be
created.

D. Videos
These videos will illustrate the step-by-step instructions with voice over narration to be
hosted on the district website and possibly the copiers themselves. The intent of these
videos is to be specific to equipment model, be short in length and clearly communicate
the information to a novice user. Some topics will require multiple documents for all the
models or may need to be broken out into separate documents to keep concise. The
videos should be specific to our language for logins and any custom screen
modifications. The expectation for this deliverable is that it would be produced by local
staff or trainers at no outside or additional cost to the proposer or the District. Previous
vendors created these videos in the training room prior to implementation.

The video topics provided should mirror the online step-by-step documents.

E. Quick Start/Use Guide
Small booklets containing more detail about copier and printer basic functions than can
fit on a poster and specific to copier or printer product family. Booklets to be attached to
the side of the copiers and can be updated, maintained and replaced during the life of
the agreement.

F. Group Training & Individual Training
Both group and individual training will be required during implementation and on-going
during the life of the contract. Details to follow.

G. Customer Care Visits
During the life of the contract we require at a minimum a customer service check at
each building or department device install location. The frequency of these checks
should be conducted at a minimum of every two weeks for all locations, and remain on-
going for the life of the contract. The purpose of the care visit would be to assist with
the following (Not intended to be a complete checklist of activities):
   1. Check in with Contact Person(s)/"Key Operators"
   2. Provide assistance with immediate basic training needs
3. Identify and coordinate additional training opportunities
4. Follow-Up on Service Call(s)
5. Print Test Sheet on Smart Laser Printers or Copiers, test finisher if applicable and check other services including applications and security settings
6. Visually inspect machine for potential wear components and proactively service
7. Place Service Calls for any discovered or unresolved issues that can’t be addressed during the visit (Proactive calls that are immediately addressed during the visit do not count as a measurable response time ticket for SLA purposes)
8. Check supply levels
9. Communicate with District ITS any network interruption or print driver Requests
10. Follow-up with Contact Person(s)/"Key Operators"
11. Respond to survey actionable items
12. Maintain "Key Operator" contact lists
13. Maintain device location maps and coordinate any moves with the District prior to moving devices
14. Log Activity

H. Service Request Labels on Copiers
   A label containing the machine model number, serial number and contact information for requesting service shall be affixed to each copier for the duration of the contract and be maintained, updated or replaced as necessary.

IV. TRAINING GROUPS
   A. Key Operators (KO) – Designated group of individuals identified initially by the District with a minimum representation of one per building and or support department. Some buildings or support departments may have additional representation depending on the number of placed devices. Proposer would be responsible for maintaining the list of KO’s and developing an on-going training plan for the life of the contract to increase knowledge, address issues and turn-up new KO’s. District can assist in the event of an unfilled vacancy upon request. KO’s will be responsible for assisting with training be initial and ongoing within their areas, answering basic questions, being a conduit of communication and where and when possible assist with advanced consumable replacements.
   B. End Users (EU) – This is a broad all encompassing group consisting of Administrators, Classified Staff and Certified Staff from all grade levels and support building locations. End Users will be referred to as District Office Staff (EU/DO), Elementary (EU/ES), Middle (EU/MS) and High School (EU/HS).
   C. Printing Services Production Staff (PS) – Staff within the Printing Services Department that will be operating the central production equipment.

V. IMPLEMENTATION PLAN TRAINING SCHEDULE
   This schedule is intended as a guide to vendors to understand our training expectations. An advanced schedule including vendor feedback will be determined during the final stages of the RFP process and may evolve as the district best determines it meeting the needs of our users to insure operational success. The district retains the right to alter this schedule based on any business decision. This schedule as described below will fall under the Service Level Agreement less the two week lead time.

   C. Initial Draft of Quick Start Signs due to district May 22nd, 2020.
   D. Final Draft of Quick Start Signs due to district May 29th, 2020.
K. Key Operator 1st Training Offering June 15th – 18th, 2020 in multiple small group sessions. (*Subject to off-contract staff availability. Two identical training opportunity days will later be offered.)
   Initial exposure and training of Key Operators in small groups so each person can gain hands on experience. Training site to be the District Office. Vendor will coordinate training schedule with provided list of participants.
L. Key Operator 2nd Training Offering, Multiple Sessions on one day between August 3 – 11, 2020.
M. Key Operator 3rd Training Offering August 24th – 28th, 2020 in multiple small group sessions.
N. Follow up and advanced exposure and training of Key Operators in small groups so each person can gain hands on experience. Training site TBD (either district office or school site). Vendor will coordinate training schedule with provided list of participants over multiple training sessions.
O. Initial Install Training for District Office Department, High Schools and Middle Schools June 22nd – June 25th, 2020.
   When equipment is placed make sure that the Quick Start Poster and Guide are posted and available staff understand the operation basics. Test the “Print” ability of the printers and copiers from a local desktop as well as scan to email and cloud storage features.
P. Initial Install Training for Elementary Schools June 29th – July 1st, 2020. (Very limited staff in building, will require additional follow-up in late July.)
Q. When equipment is placed make sure that the Quick Start Poster and Guide are posted and available staff understand the operation basics. Test the “Print” ability of the printer and copier from a local desktop as well as scan to email and cloud storage features. Chances are no staff will be available in the Elementary Schools until late July. Postponed Initial Install Training for Elementary Schools July 27th – July 31st, 2020.
   Scheduled visits to each Elementary School to insure available staff understand the basic printer and copier operations. Test the “Print” ability of the printer and copier from a local desktop as well as scan to email and network features.
R. Note that four District schools will be under construction and are scheduled to be completed in late July. Each of these locations will take delivery on a delayed schedule. The District will fine tune the implementation schedule with the selected vendor.
   Based on a schedule proposed by the vendor, trainers will be present for 1 day (8 hours/each) in each building over an 4 day period.
   Based on a schedule proposed by the vendor, trainers will be present for 2 days (8 hours/each) in each building over a 10 day period. The days should not be consecutive at the same building. High Schools will require two trainers at a time vs. one at Middle & Elementary Schools.
U. PS Staff will need a minimum of one week of initial training and oversight on production printers beginning when install is complete including analyst support to create stock libraries and print queues associated with the RSA Workflow and oversight on production printers and workflow. Late June - Early July.
V. PS Staff will need a minimum of one week of follow up training, analyst support to create stock libraries and print queues associated with the RSA Workflow and oversight on production printers and workflow. Late summer.
W. If option of large format equipment is selected, manufacturers training on all equipment and software provided will be scheduled with PS Staff at a later date after the conclusion of the Production Printer install. A minimum of 2 additional days of vendor
product support training to be included at a later date if the equipment is purchased as part of this proposal.

VI. ONGOING TRAINING
A. Phone Support
B. Care Visits (see I./G.)
C. On-Demand Requests for One on One or Group Trainings
   Vendor will need to identify a system for receiving requests, reporting requests to the district coordinator and generating a response to the request.
D. Staff Development Training Day Opportunities – Provide Group Training Classes on a designated day as available. Topics to be determined between district and vendor based on common issues and requests meant to build up the “Key Operators”
E. Vendor is encouraged to offer alternative virtual training opportunities outside of the Staff Development Training Days to increase participation and passing of information to “Key Operators” and other target groups as approved by the District coordinator. The creation of training video topics to be linked on our Intranet website is an expected model of delivering communications as it is often hard to gather audiences for live trainings.
F. Vendor to review RSA usage data along with fleet volume data with Printing and Logistics Services Coordinator to determine building specific areas of training opportunity to encourage usage and migrate appropriate work to lower cost equipment. Vendor will assist the District in providing follow-up training in areas where they may be over using their local printers and copiers in the spirit of reducing the potential for service issues in out years on the local devices.

VII. ADDITIONAL TRAINING NOTES & EXPECTATIONS
A. Communication Plan
   Assist the district with the development content and initiating the discussion for proactive communications to end users that will assist with the changing to new technology and operations. Communications will include short stories in existing newsletters, e-mail communications and website updates.

   Example of each:
   Newsletter story – announcement on how to login to the new copiers.

   E-Mail Communication – basic instructions from the Quick Start Signs.

   Web Site – repository for all announcements and memos in addition to training documents and videos and initial project schedule.

B. Measurement
   1. Survey – Give feedback on the district created initial end user survey to be used within three months after install and the ongoing quarterly survey’s - to be used for gaining information about training and other customer service opportunities. This survey is part of the SLA. Vendor is expected to review, summarize, create an action plan, present to the District and implement the plan each quarter as a result of the data collected.
   2. Usage Data – Review device feature usage data by location with district contact to determine if additional training is necessary and to pinpoint trends that may later lead to service issues.

C. Final Approval - All Communications and Training Materials
   The District coordinator will have the final approval on all training materials including content, format and branding.