

Contract Committee Review Request
MUST BE COMPLETED IN FULL

Date: 2.24.22

Contract/Agreement Vendor:
Name of Vendor & Contact Person

Vendor Email Address

Describe Contract (Technology, program, consultant-prof Development, etc.)

Please use Summary below to fully explain the contract purchase, any titles, and details for the Board of Education to review.

Reason/Audience to benefit

BOE Date Amount of agreement

Person Submitting Contract/Agreement for Review:

PLEASE SEND THROUGH APPROPRIATE APPROVAL ROUTING BEFORE SENDING TO BOARD CLERK

Principal &/or Director or Administrator:

Does this Contract/Agreement utilize technology? YES/NO
 If yes, Technology Admin:

Leadership Team Member:

Funding Source:
Fund/Project OCAS Coding

Consent

Action

Dude Solutions will configure for BAPS an Inventory Direct program for tracking inventory levels, issues, receiving, etc and to tap into Asset Essentials (maintenance's program) for warehouse/custodial work orders.

Summary *This area must be complete with full explanation of contract*

The Contract/Agreement should be received at least 2 weeks prior to a Board Meeting to ensure placement on the Agenda. The Contract Committee meets most Tuesdays at 8:00a.m. All Contracts/Agreements, regardless the amount, must be first approved by the Contract Committee and then presented to the Board of Education for approval and signature. The item will be placed on Electronic School Board for the board agenda by Janet Brown. By following this process, the liability of entering into an agreement is placed with the district rather than an individual.



Software for Smarter Operations

PREPARED FOR

Broken Arrow Public Schools

Charles Abbott
701 S Main Street
Broken Arrow, OK 74012

PREPARED BY

Dude Solutions
11000 Regency Parkway, Suite 400
Cary, NC 27518

PUBLISHED ON

February 01, 2022





Q-274131

Charles Abbott
Broken Arrow Public Schools
701 S Main Street
Broken Arrow, OK
74012

Dear Charles,

Thank you for your interest in our market leading solutions for improving educational operations. We at Dude Solutions are excited about providing you with online tools that will help you save money, increase efficiency and improve services. Dude Solutions is dedicated to providing best in class solutions that are built exclusively for the unique needs of educational institutions, including the following for Broken Arrow Public Schools:

Service Term: 39 months (04/01/2022 - 06/30/2025)

Services			
Services Invoice - Year 1			
Item	Start Date	End Date	Investment
InventoryDirect	4/1/2022	6/30/2022	0.00 USD
Subscription			0.00 USD
Year 1 Total:			

The Services invoice for Year 1 will be issued upon acceptance of the Order Form. Subsequent Services Invoices will be sent annually.

*3 months included at no charge on the first invoice.

*23% off product included in pricing

Professional Services	
Inventory Standard Implementation	2,433.90 USD
Virtual Consulting Service for 4.0 days	5,027.40 USD
Professional Services Year 1 Total:	7,461.30 USD

Q-274131





Remaining Services Invoices

Item	Annual period Beginning	Investment
Year 2	7/1/2022	10,472.00 USD
Year 3	7/1/2023	10,733.80 USD
Year 4	7/1/2024	11,002.14 USD





Software for Smarter Operations



Virtual Consulting Services - Statement of Work

Purpose

Dude Solutions' (DSI) virtual consulting service is designed to provide our clients with focused guidance by experienced consultants to ensure an effective and efficient deliverables to aid their utilization and achieve a faster ROI. This may include meeting with key stakeholders to ensure the set-up and configuration of the system will meet the client's current and future needs; workflows meet the needs of the business; available data is cleaned, aligned and imported; and end users are trained and ready for go-live.

Value

By partnering with Dude Solutions, you are provided expert guidance in the best practice configuration and usage of your Dude Solutions applications. You will experience faster time to value. Focused virtual consulting services allow a client to focus on their day to day operations and let us take on the burden of one-time tasks related to data, configuration and training. Our team will bring their thousands of hours of expertise to the table, helping ensure a smooth transition to their new Dude Solutions application or adoption of new functionality.

Deliverables

The following list is of categories of outcomes that can be achieved through. The specific deliverables included in your service will be documented and presented to you by your Project Coordinator. If additional services are requested, a new Consulting Services SOW may be required. Virtual services are delivered in a minimum of 2 hour increments, or until the desired outcome is reached.

Discovery:

- Virtual Interviews and requirements gathering of current process and desired outcomes. Virtual sessions to review desired outcomes and change management process around configured data, categorizations, end-user provided values and reporting needs.

Data Loading and Account Configuration:

- Data Loading of Pick List values or primary record data (e.g. work orders, events, PM schedules) in your applications. Reviewing, removing duplicates, making recommendations for best alignment of data categories and aligning with DSI Import templates for inclusion in your solution.

User Training:

- Administrator and/or Role based user training to include functions associated to specific role permissions. Including maintaining current data in your account, basic or advanced workflow function and non-administrators' recurring activity regarding creation and processing of records.

** Service outcomes may be dependent on the version of the solution the client owns. Verify that your desired outcomes can be achieved with your current application subscription.

Evaluation



At the conclusion of the service, the consultant will forward notes to your project coordinator capturing what was accomplished and any recommended next steps. The project coordinator will schedule a follow-up call within 2 weeks of the service. Ongoing communication until the project is complete will be through your Basecamp project if the service is incorporated into a larger implementation project, or via email.

Client Assumptions

- Data should be provided in an Excel or CSV format in one sheet or workbook with unique records in each row. Multi-tab spreadsheets or multiple rows of data per record will not import successfully and will require additional services. DSI cannot access or extract data from other systems or locations.
- Not all data from a legacy system or database will have a one for one match in your DSI solutions. We will work with the client to determine the best approach to capture and map this data.
- Client is responsible for providing login information ahead of time to users, as well as provide devices where the mobile app(if applicable) or web browser is downloaded and up to date.
- Client is responsible for troubleshooting any issues related to their IT infrastructure including network and device management.
- The client will schedule time for the appropriate resources to be available to the consultant for the duration of any confirmed virtual meeting(s). The success of this process is dependent on the attendance and responsiveness of the key stakeholders.
- Client will verify with their DSI Project Coordinator that they have the correct versions of applications to allow for requested changes to their data or account configuration.
- The client will also provide a dedicated room or area with adequate technology for successful virtual training, including but not limited to monitor/projector, computers/tablets and wireless internet access.
- Client acknowledges rescheduling or cancelling services within 2 weeks of the confirmed date will require rescheduling based on current availability which may result in delays to the larger implementation project.



Inventory - Standard Implementation

Purpose

Dude Solutions' (DSI) InventoryDirect (ID) with Standard Implementation Service is designed to provide our clients with a prescriptive 60-day project plan to ensure an effective and efficient implementation and a faster ROI. This includes access to DSI's World Class Implementation Tools – online Help content, an interactive project plan, and a dedicated Implementation Specialist to provide guidance and insight along the way.

Value

By partnering with Dude Solutions and taking advantage of our Standard Implementation Service, you will receive expert guidance in the best practice configuration and usage of InventoryDirect. You will experience faster time to value. By following our focused project plan, clients who leverage our Standard Implementation Service can see their ID site configured and ready to use within 30 days, plus an additional 30 days of go-live support from your Implementation Specialist. Our Train-the-Trainer approach streamlines the implementation process and empowers the Client Project Lead to fully own and operationalize ID quickly within their organization.

Deliverables

- Project Kickoff Call with a DSI Project Coordinator
- 60-day access to Basecamp – interactive project collaboration tool
- Optional template-based data imports for available Location, Inventory Item, and User data during the project period
- Up to (4) 1x1 calls with a dedicated Implementation Specialist
- Up to (4) Go-Live Support calls for additional assistance during roll-out
- User Acceptance Testing (UAT) guidance during Go-Live Support period
- Train-the-trainer best practices and content
- Unlimited access to online Help content – during and after implementation

Methodology and Approach

With over 12,000 clients successfully using our software, we understand the importance of moving quickly to be able to configure a new system and drive adoption within your organization to facilitate a smooth transition from your current system to InventoryDirect. Your Standard Implementation will begin with a Project Kickoff Call with one of our Project Coordinators. From there, a dedicated Implementation Specialist will guide and assist you through the implementation project.

Here's what a typical implementation timeline can look like:

Project Kickoff Call – Day 1



	<ul style="list-style-type: none"> • Confirm key participants with roles and responsibilities for both Client and DSI: <ul style="list-style-type: none"> • <i>Client Project Lead</i> = Individual on the client's side who will be directly involved with the implementation and primarily responsible for completing the project • <i>DSI Implementation Specialist</i> = ID SME who will be the client's primary resource during implementation, providing best practice guidance along the way
Project Kick-Off	<ul style="list-style-type: none"> • Introduce Basecamp as our project collaboration tool <ul style="list-style-type: none"> • Access to Online Help content • Includes the list of "To Do's" that constitute the project plan • As you complete To Do's, your ID account takes shape! • Establish the implementation timeline and key milestones, including the projected completion date
Building Your Foundation – Weeks 1-2	
Account Setup and Configuration	<ul style="list-style-type: none"> • Learn about fundamental setup and configuration in ID <ul style="list-style-type: none"> • Locations and Pools • Inventory Items • Users • 1x1 call with your Implementation Specialist to prepare for importing available data • Begin configuring your account
Work Order Management – Weeks 3 - 4	
Account Setup and Configuration	<ul style="list-style-type: none"> • Learn about transactions and workflow • Continue account configuration <ul style="list-style-type: none"> • Request/approval routing • Email Notifications • Inventory management via Transactions • 1x1 call with your Implementation Specialist to review setup, configuration and workflow
User Acceptance Testing (UAT) – Week 5	
Use Case Testing and User Training	<ul style="list-style-type: none"> • Complete specific use case tests with internal users to confirm expected functionality before rollout • 1x1 call with your Implementation Specialist to review UAT results and confirm UAT passed
User Training – Week 6	

Use Case Testing and User Training	<ul style="list-style-type: none"> • Begin showing end-users the system so they can begin accessing ID to request and manage work orders • Leverage Help Documentation
Go Live Support – Weeks 5-9	
Go Live Support	<ul style="list-style-type: none"> • Wrap up UAT and user training • Begin using ID • Provide internal support for basic usability questions • Follow up weekly with your Implementation Specialist to review progress with UAT, User Training, and rollout
Implementation Complete! – Day 60	
Implementation Complete and Project Close	<ul style="list-style-type: none"> • Confirm goals defined during Kickoff call have been met • Confirm product readiness • Introduce ongoing DSI resources • Close project

Excluded from Standard Implementation

For the avoidance of doubt, the following services are not included:

- Evaluation of your current practices, policies and procedures for the purposes of performance improvements.
- Troubleshooting any issues related to your IT infrastructure or mobile devices
- Migration of data from other systems or locations
- Export of data to any other systems or third parties
- Role-based end-user trainings

Completion Criteria

The steps (To Do's) in the Basecamp project plan represent the individual activities that constitute Standard Implementation for InventoryDirect. Upon completion of the required To Do's, the Standard Implementation Service will be deemed delivered and the project will be closed. Some To Do's may not be applicable to the Client's needs and may be waived from the project upon agreement between the Client and Implementation Specialist. Some To Do's (data importing, for example) are considered optional and may or may not be completed depending on the availability of data to be imported. Completion of optional To Do's is not required to complete delivery of Standard Implementation and close the project.

Client Assumptions

The success of this project is dependent on the attendance and full engagement of the key stakeholders.



- The client will schedule time for the appropriate resources to be available to the Implementation Specialist for all scheduled and/or required activity.
- Should the need to reschedule any engagements arise, the client will be responsible for reaching out to their Implementation Specialist within the 60-day project duration window and will be subject to the Implementation Specialist's availability.
- The client shall be primarily responsible for providing access and training on InventoryDirect to end-users.
- The client will provide data to be imported in a timely manner and in the template format provided via Basecamp so the Implementation Specialist has an opportunity to import the data during the 60-day project period.
- If there is no existing data, the Implementation Specialist will guide the client on how they can manually create Locations/Buildings, Equipment Items, and Users in their account.

Project Assumptions

DSI has made the following general assumptions in this SOW to derive the estimated cost for this project. It is the responsibility of Client to validate these assumptions and responsibilities before signing the Acceptance. Deviations from these assumptions may impact DSI's ability to successfully complete the project. DSI is not responsible for delays caused by missed scheduled engagements and low engagement preventing client from being able to successfully implement.

- Standard Implementation is designed and resourced to be completed within 60 days of the project kickoff call. In the event additional time is required, there is a mechanism to purchase a Project Extension. Implementation Specialist will need to be notified that an extension is needed at least 10 days in advance.
- Without an extension, the implementation project will be closed after 60 days and the Implementation Specialist redirected, but the client will retain full access to InventoryDirect along with online Help Documentation, and our Legendary Support Team
- DSI is not responsible for delays caused by missing data or other configuration information that is required to be available prior to the Standard Implementation service. Having the requested data and configuration information available prior to implementation may minimize delays so progress can be made quickly.
- Project extensions will be considered for extenuating circumstances and will follow the change control process, which requires management approval.

Change Controls

Parties may agree to modify the Services through a written change order specifically referencing this applicable Statement of Work. Such change order will become part of the applicable Statement of Work when executed by both Parties, and the services described therein will become part of the Services.

You may request that DSI add services not in the Specifications by submitting a written proposed change order to DSI, in the form found here: <https://www.dudesolutions.com/sites/default/files/documents/Professional%20Services%20Change%20Order%20Form.pdf> (Change Order Form). Vendor shall negotiate in





good faith regarding change order prices and shall not require rates higher than those set forth in Section __ (Service Rates). Such change order will become part of the applicable Statement of Work when executed by both Parties, and the services described therein will become part of the Services.



Order Form terms

- By accepting this Order Form, and notwithstanding anything to the contrary in any other purchasing agreement, Subscriber agrees to pay all relevant Fees for the full Services Term defined above.
- The "Effective Date" of the Agreement between Subscriber and DSI is the date Subscriber accepts this Order Form.
- This Order Form and its Services are governed by the terms of the Dude Solutions, Inc. Master Subscription Agreement found at <https://www.dudesolutions.com/terms> (<https://www.dudesolutions.com/terms>) ("Terms"), unless Subscriber has a separate written agreement executed by Dude Solutions, Inc. ("DSI") for the Services, in which case the separate written agreement will govern. Acceptance is expressly limited to these Terms. Any additional or different terms proposed by Subscriber (including, without limitation, any terms contained in any Subscriber purchase order) are objected to and rejected and will be deemed a material alteration hereof.
- To the extent professional services are included in the Professional Services section of this Order Form, the Professional Services Addendum found at <https://www.dudesolutions.com/terms> (<https://www.dudesolutions.com/terms>) is expressly incorporated into the Terms by reference.
- During the Term, DSI shall, as part of Subscriber's Subscription Fees, provide telephone and email support ("Support Services") during the hours of 8:00 AM and 6:00 PM EST, Monday through Friday, excluding New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, day after Thanksgiving, Christmas Eve and Christmas Day ("Business Hours"), except Community Development Services, where Business Hours means 5:00 AM – 5:00 PM PST.
- Unless otherwise specified on this Order Form, DSI maintains the right to increase Subscription Fees within the Services Term by an amount not to exceed the greater of 6% or the applicable CPI and other applicable fees and charges every 12 months. Any additional or renewal Service Terms will be charged at the then-current rate.
- Acceptance of this Order Form on behalf of a company or legal entity represents that you have authority to bind such entity and its affiliates to the order, terms and conditions herein. If you do not have such authority, or you do not agree with the Terms set forth herein, you must not accept this Order Form and may not use the Service.
- Proposal expires in sixty (60) days

Additional information

- Prices shown above do not include any taxes that may apply. Any such taxes are the responsibility of Subscriber. This is not an invoice. For customers based in the United States, any applicable taxes will be determined based on the laws and regulations of the taxing authority(ies) governing the "Ship To" location provided by Subscriber. Tax exemption certifications can be sent to accountsreceivable@dudesolutions.com (<mailto:accountsreceivable@dudesolutions.com>).
- Billing frequency other than annual is subject to additional processing fees.
- Please reference Q-274131 on any applicable purchase order and email to accountsreceivable@dudesolutions.com (<mailto:accountsreceivable@dudesolutions.com>)
- Dude Solutions, Inc. maintains the necessary liability coverage for its products and professional services.



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Proof of insurance can be provided upon request.





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At Dude Solutions, we understand the yearly budgeting cycle of educational institutions. If you need us to pro-rate the annual fee based on your budget cycle, please let me know. I will provide you with the pro-rated cost based on the number of months remaining in your fiscal year.

Thanks again for your interest in utilizing our web-native solutions to integrate and more efficiently manage your operations. Please feel free to contact me with any questions at 9194596446 or by email at jason.harris@dudesolutions.com.

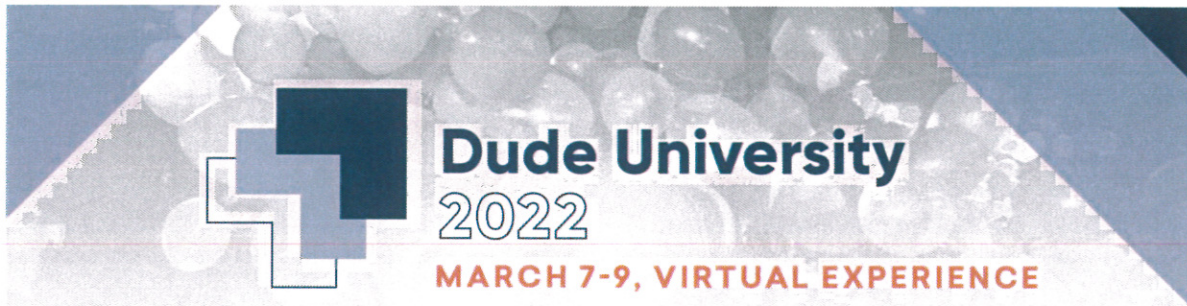
Sincerely,
Jason Harris
Dude Solutions

Please address the purchase order to:

Dude Solutions
11000 Regency Parkway, Suite 400
Cary, NC 27518

***** Please mail or email the purchase order to jason.harris@dudesolutions.com.**





As the world moves forward, we must bring our creativity and ingenuity with us into the future. Your new skills – interpersonal, problem solving, digital literacy, and more – are the key to preparing for the uncertainties of tomorrow.

You have responsibilities – to increase efficiency, mitigate risk and future-proof your organization. It's a big job. And the people you serve are depending on you.

At Virtual Dude University 2022, we want to celebrate your accomplishments, inspire your organization's transformation and provide you with the practical knowledge you need to turn your plans into reality.

Virtual Dude University is **March 7th-9th 2022**. Attendees are in for the best yet, with more knowledge, training and technology than ever before.

- **Build a strategic vision** for your department and ensure goals align with the mission and vision of your organization.
- **Save your organization time and money** by investing in the training you need to keep your operations excellent and highly efficient.
- **Learn how your peers are successfully overcoming similar challenges** so you can be a leader of positive change.

Your registration also includes:

- **Expert-led sessions:** Hear industry pros talk about how to future-proof your operations amidst a changing workforce, utilize data and analytics for better decision-making, and get back to basics by automating and optimizing your operations.
- **Best-in-class training:** Get training with Dude Solutions software, so you can strengthen your team's skills and confidence.
- **Hearing from your peers:** Hear what fellow clients have to say as they share their successes and lessons, and pick their brains during Q&A.
- **Community:** Leave feeling part of the Dude Solutions family and understand why we always say, "The Dude is beside you."

Admission for Virtual Dude University is \$299. Registration is open beginning January 27th through March 4th, 2022. Hurry, Register today!



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Signature

Presented to:

Q-274131

February 01, 2022, 1:31:32 PM

Accepted by:

Printed Name

Signed Name

Title

Date