

Interviewee A (Alisa Morningstar)

- Documents are disposed of, files not kept throughout the evaluation process.
- Evaluation points changed from Phase 2 to Phase 3.
- The RFP included a plan for training and each bidder provided a plan for training. Indirect costs, e.g. salaries of school district employees conducting the training are not included in the total cost of ownership of this initiative.
- Not aware of the Superintendent sitting in on the vendor selection committee. The Superintendent read responses of vendors and commented.
- It was unprecedented that the Superintendent and Deputy Superintendent would sit in on the committee meetings.
- Politics is the reason why ^{interviews w/ names typed} newspaper doesn't an ^{of} proportion. The owner of local ^{end} endent.
- Donna Olive ^{interviews} was person who coordinated evaluation pr.
- The Superintendent ^{not} regarding this project until the last phase.
- Was told by Donna ^{not} the Superintendent and Deputy Superintendent wanted to be more involved in the evaluation process.
- When Don Beers, the Deputy Superintendent, came to the school district as an Apple proponent.
- The laptops initiative started in May 2004. Purchasing was told to put it out to bid.
- The first two months were spent writing the RFP.
- The lowest priced vendor meeting specifications is awarded the bid. Anything over \$50,000 goes to bid or RFP. RFP has an evaluation process. Price is not the sole factor. Anything under \$50,000, just try to get a quote.
- During the Pre-Qual Phase look for experience in deploying large amounts of laptops. Ability to deploy a minimum of 2,000 laptops. Gateway was non-responsive. We received 9 or 10 initial responses. Four were pre-qualified by way of answering questions and their references were checked. Pre-qualification was determined by the pre-qual committee. The Superintendent was not involved in this phase but the Deputy Superintendent was indirectly involved. The

committee wrote the RFP and most of the committee was involved in reviewing the pre-qual data. Additional people added to the committee for the 2nd phase.

- The evaluations were consolidated copies of the evaluations were not kept.
- Technology has been outsourced to Titan. Kim Quinn became the Chief Information Officer recently.
- The evaluation process is both subjective and objective. For example, interpretation comes into play as when we got a bad reference, e.g. IBM got a bad reference in that it was slow getting parts to a university in North Carolina.
- Indirect costs were not evaluated, only direct costs for purposes of awarding contract.
- Only 4 vendors were considered in Phase 2.
- Phase 3 consisted of narrowing the field of vendors and getting their best and final prices.
- Also during phase 3, vendors are asked how they are going to recap how they are going to address areas where vendors were weak. Vendors are told they have another chance to clarify what they had submitted in Phase 2.
- Dell had highest score after Phase 2. Apple had highest score after Phase 3. Deal with batteries. Apple would provide 4 batteries per machine. Originally offered 1 at a discounted price. Batteries were considered a significant item since for SPLOST I batteries cost \$600,000.
- Three and four year lease options were considered. Went with 4 year lease and insisted that the vendors must provide batteries for life of lease.
- Titan did a technical evaluation.
- With a sealed bid, vendors get one chance. With an RFP vendors get a 2nd chance to meet qualifications.

Interviewee B (Charles Sprayberry)

- Involved in the Pre-Qual phase and phase 2. He was not involved in phase 3.
- The Pre-Qual phase was to determine the viable vendors who had experience and the financial wherewithal to handle this large initiative.

- The 2nd phase committee was broken down into sub-committees such as technical, staff development and other subcommittees.
- Sub-committees made presentations and recommendation to the whole 2nd phase committee. Scoring Points arrived at by subtracting points subtracted for what was not offered. Consistent from vendor to vendor.
- Stated that whereas he didn't feel pressured to pick one vendor over another he said that there were expectations. He said that stemmed from the fact that a lot of people spent a lot of time at Henrico County (school district) which was an Apple user, therefore there was an expectation that Apple would be a good fit here because it was so successful up there.
- Donna Oliver was chairman of the committee.
- He didn't see final pricing.
- Not aware that his work was thrown away. Now that we mentioned it, he may have heard that but finds it hard to believe.
- Remembers a statement, maybe during a meeting break that there's an expectation (by Donna Oliver) that Apple would make the finals.
- Donna Oliver met with Dr. Beers on a weekly basis. Felt she was a little more direct. Seems her retirement was out of the blue.
- There was a discussion that Apple's presentation did contain things that were at Henrico. Going back to Apple to question them, they would clarify.
- We would go to external sources (e.g. Gartner's) for technical abilities of vendors.
- Made him question that if Apple rated so low, should we have them in the finals. After Apple rated low, we went back to Apple and asked for additional input. Went over all points to see if the points were correct.
- He worked with the forms. Kept my notes until we filled out summary sheets for the next meeting and then he trashed his notes.
- Could not remember Apple's deficiencies.
- Fairly common to end up with one master spreadsheet maintained by purchasing.
- He thought the "process" was very thorough, no stone left unturned. Comprehensive.
- In hindsight, too many people involved.

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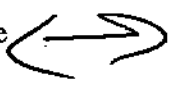
- This would be one of the biggest district contracts, \$104 million in the long term (12 years)

Interviewee C (Jill Vestal)

- Was not involved in Pre-Qual phase but she did attend a pre-RFP meeting.
- When responses to RFP came in she went to the meetings to take notes.
- She said her notes were put into a file. She typed up some but not all because it was "fast & furious" and she had many other duties to fulfill.
- People always have certain preferences. Not a big division. Regarding the tech people, she felt that they were not pro Apple. She said the consultant, Jim Finger was anti-Apple. She's not sure if the curriculum people were pro any particular company.
- She said she knew some people were pro Apple and some weren't.
- Regarding the different selection phases, she said one phase built on the next.
- In phase 2 we were supposed to pass on finalists to the next phase. When we go to phase 3, we add points for cost to the non-cost points already received in phase 2.
- Knew from the beginning there would be a 3rd phase but doesn't remember how it was communicated.
- We've already looked at all this (in 2nd round), why bother with it again in round 3.
- Redden and Beers come in to 2nd round meetings once or twice to find out when the committee would be finished.
- Knew Donna Oliver was pro-Apple but didn't know if that was coming from the bosses.
- In Phase 2 we don't look at price. Look to see if the vendors meet the specs.
- Kim Quinn was not in the phase 2 evaluation meetings. She came in one meeting early on and made a presentation about the State of Maine initiative. Then didn't see her again until the vendor presentations.
- Donna Oliver, Director of Media appeared to be close to Beers. At a meeting, Donna Oliver said "We all know how this has to turn out."

Certain phase 2 committee members were pro-active for Apple.

Interviewee D (Kim Quinn)

- Was brought in on Phase 2 as part of the team at CCSD looking at laptop proposals.
- The Phase 2 team scored everything but price at first then later scored price.
- Felt that the computers were equal even though Dell and IBM got highest scores.
- Stated that the PreQual stage was more about vendor background not laptop and price background.
- Once a vendor made it to the finals, the "slate is wiped clean" concerning all the evaluations. HP was dropped and the point system started over for the BAFO. 
- Said that Apple was chosen because of price and what they would provide – service and support, professional development and training. Apple also supplied extras that were not required – 5 gigs storage, f5 megs storage for each student, and additional batteries.
- Thought that Apple was to provide complete training.
- All the companies were the same in providing insurance through a 3rd party.
- Stated that although Redden and Beers attended the meetings in phase 3, they did not score the vendors.
- Stated doesn't know why the large Phase 2 group was narrowed down for Phase 3.

MK Start anew w/ BAFO

Interviewee E (Brent Williams)

- Does not how vendor ratings were devised.
- Dell Latitude was the top machine that was evaluated.
- Felt that the committee was just going through the motions. Didn't matter how they rated Dell and IBM because it had been pre-determined that Apple would be selected.

- It appeared that the Superintendent had become enamored with Apple and how it as being implemented in other districts.
- Apple scored lower regarding batteries.

Interviewee F (Gail May)

- In Phase 2 we looked at each major category and compared what vendor said it could do versus what CCSD required.
- Stated that was aware there would be a 3rd committee which would not use the results from Phase 2. All three vendors were good, therefore, price would rule. Although would have preferred that Phase 3 committee would have chosen our number 1 ranked vendor.
- Phase 2 committee was broken up into sub-committees which would score the vendors and bring back its scores to the full committee.
- Relying on the CCSD staff for training would be a problem. We rated a vendor low in the training category if the vendor relied on CCSD staff to do the training. However, all three vendors met at least minimum training.
- Shredded notes.
- Does not know what happened to the scoring sheets used during Phase 2.

Interview G (Linda Morrell)

- Pre-Qual (Phase 1) committee wrote up the RFP.
- During Phase 2 we assigned points to each evaluation category but doesn't remember how that was done.
- We looked at meeting the needs over a four year period.
- Battery replacement was identified as one of the biggest anticipated problems. Not looking for the Cadillac but something that would last.
- Many hours spent by committee during Phase 2. Spent countless hours reading at home.

- Committee was broken up into sub-committees.
- There was a time during the scoring process when there was a discussion about “value added” for which Apple was given more points.
- Some of Donna Oliver’s comments made it seem as though she was trying to steer us toward Apple. That made me feel uncomfortable. During a break one committee member said to certain others that it seemed as though Donna Oliver was being influenced by someone outside the Phase 2 committee.
- We weren’t supposed to evaluate cost during Phase 2. Doesn’t remember discussing points for cost.
- Feels that the scoring summary, which included points for cost, must have been put together after the Phase 2 committee finished, even though scoring for cost appears on the Phase 2 spreadsheet.
- Discussions with other committee members revealed that some felt that Apple was an inferior product.
- Dell offered superior training.
- Apple provided a good plan but depended too much on the CCSD staff.
- Mr. Morales’ staff did a TCO (Total Cost of Ownership) but doesn’t recall seeing a training analysis on the TCO document.
- It was understood that on Phase 2 we would agree on a score and then pass that information on to Phase 3 for consideration. It was also understood that the Phase 3 committee would use the Phase 2 scoring along with a consideration for cost.
- Was not aware that the Phase 3 committee would not consider the Phase 2 evaluations.
- Most of notes taken during Phase 2 were as a group on chart paper and Post-it notes.
- Understood that Alisa Morningstar would keep official files.
- HP was dropped because it was a joke. Did not respond to requests. Additionally, HP training would be on-line and we did not want on-line training.
- Was under the impression that Phase 2 committee would move on to Phase 3 but Redden decided that only Donna Oliver and Alisa Morningstar would advance to Phase 3.

Interviewee H (Jim Finger)

- Evaluated the pros and cons of each proposal during Phase 2.
- Stated that Phase 2 committee scored on all aspects except price. Price evaluation was to be left to the administration and purchasing.
- Understood that the hard work in Phase 2 would be used toward final decision in selecting a vendor.
- Was not involved in evaluating pricing although originally thought that would be the case.
- Dell and IBM were way ahead of Apple as a result of the Phase 2 evaluation

Interviewee I (Donald Beers)

- Deputy Superintendent responsible for selecting committee
- Pre Qual committee simply decided whether vendors were eligible to go forward to the next phase.
- Phase 2 committee listened to the proposals of those that qualified.
- Phase 3 committee pinpointed the finals through the BAFO process.
- Phase 2 did not consider price.
- Phase 3 committee, without the Superintendent and Deputy Superintendent, scored the vendors.
- Phase 3 committee was to evaluate the relative attributes of the vendors that made it to the finals.
- A smaller group in Phase 3 scored the vendors and brought scores to Superintendent and Deputy Superintendent to establish BAFO. Those scoring the vendors reached some kind of relative merits of each one.
- At the end of Phase 3, meet with vendors and request from them the most service for the best price.
- Thought that Dell was going to win.

- Batteries, help desk and training were very important aspects of proposals.
- Although the scoring spreadsheet looked familiar, doesn't know how Phase 3 committee arrived at points.
- Selection decision had more to do with how to change education not as much to do with an automation tool.
- Decision not based on a point decision but more on informed intuition.
- Before deciding looked over spreadsheet of points scored by each vendor and looked at what other school districts were doing.
- In the end, price was a big part of decision. We would have struggled if Dell had been cheaper than Apple.
- Dell would have cost a great deal in training. Dell pulled the batteries off the table.
- Apple was flexible regarding the batteries.
- IBM could have won had they given us the X-40 machine.
- The Phase 3 group, without the Superintendent and Deputy Superintendent, met to come up with the scoring spreadsheet and then the BAFO brought to Superintendent and Deputy Superintendent and then entire Phase 3 group met with the vendors.
- We took indirect costs into consideration in making our decision but indirect costs were not included in the TCO.
- HP was least impressive. Mindy is an HP person in Dekalb.
- After we selected Apple, a new machine was introduced by Apple. We went with the new machine at the same cost.
- A group visited Henrico County which had selected Apple for its school district.
- The BAFO documents were post-dated as compared to decision date just as a way of finalizing what had already been agreed to verbally.

Interview J (Joe Redden)

- A team of people built an RFP that was reviewed by lawyers and others.
- Structure of RFP – 3 Phases, the first being a qualification phase. Must have suppliers that could meet the need for lots of laptops. 13 vendors responded and 9 were eliminated in the Pre-Qual phase.
- The four vendors that made it to the 2nd phase were HP, Dell, Apple, and IBM. Picked because all four are considered leaders.
- Visits were made to all four.
- Scoring of vendors was in regard to completeness of RFP. Price was not to be a factor in scoring. Doesn't understand why Phase 2 score sheets include a scoring for price.
- Of the four finalists, only three could support the initiative.
- A bias existed in some of the Phase 2 committee members. This interviewee
- Said his bias was to IBM. Some of the bias was based on ignorance. Easiest decision we could have made was to award contract to Dell. Dell was proposing a Mercedes S Class that CCSD couldn't afford.
- During Phase 3, Apple added staff and lowered price, IBM increased price and Dell eliminated batteries.
- The laptops were tested but does not know where test results are.
- With apple failing so much in terms of specs, Apple was considered for price and competition. IBM was going to sell out to the Chinese.
- There were substantial changes between Phase 2 and Phase 3.
- Committee meeting minutes do not exist.
- Doesn't know where the assigned numbers are as required by the RFP. CCSD will have to find them.
- Interviewee was a voting member of the committee yet did not score the laptops. Interviewee was silent when asked if the scoring numbers in Phase 3 were plugged on the spreadsheet after the decision was made. After a sustained silence, interviewee stated that the BAFO sheets were the basis for the award.
- Indirect costs were not considered in Phase 3.

Interviewee K (Cheryl Hungerford)

- Assisted in writing the RFP
- Apple, Dell, and IBM met the RFP requirements and HP did not.
- Awarded points to the vendors. Dell came in first, IBM second, and Apple third.
- Dell was going to do all the training, whereas Apple depended on CCSD to do more of the training. Dell also had a strong on-line tutorial.
- Did not evaluate and score price in Phase 2.
- From a technical perspective, Apple was not rated as high as Dell and IBM.
- Teachers like the Apple.