

**STATE OF WASHINGTON  
OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION  
OLYMPIA, WASHINGTON**

**REQUEST FOR PROPOSALS (RFP)**

**RFP NO. SBAC - 01**

*This RFP is available at the Office of Superintendent of Public Instruction website located at <http://www.k12.wa.us/RFP/> and at the Office of General Administration, Washington Electronic Business Solution (WEBS) Procurement Website at <http://www.ga.wa.gov/webs/>. All RFP amendments or bidder questions/OSPI answers will be posted to these sites. All interested proposers must be registered with WEBS in under the following commodity codes in order to receive notifications: 9805*

**PROJECT TITLE:** SMARTER Balanced Assessment Consortium  
Communications Services

**PROPOSAL DUE DATE:** 4:30 PDST, March 25, 2011

**EXPECTED TIME PERIOD FOR CONTRACT:**  
May 20, 2011 through September 30, 2014

**ELIGIBILITY:** This procurement is open to those consultants, vendors, and other entities that satisfy the minimum qualifications stated herein and that are available for work in the United States of America.

*The SMARTER Balanced Assessment Consortium brings together 31 states to create a common, innovative assessment system aligned to the Common Core State Standards in mathematics and English language arts for the purpose of furthering member states' goal of ensuring all students leave high school prepared for postsecondary success in college or a career. To better attain this goal, the Consortium works in close collaboration with representatives from institutions of higher education from its member states. The Consortium is led by its member states with management support from WestEd, a not-for-profit organization whose 45-year charge has been focused on bridging the gap between research and practice. The Consortium's projects are funded through a four-year, \$175 million grant from the U.S. Department of Education, comprising 99% of activity resources, with the remaining support provided through generous contributions of charitable foundations.*

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### **Message to Consultants:**

Effective November 1, 2008, the State of Washington is required to publish all bidding opportunities on the Office of General Administration's Washington Electronic Business Solution (WEBS) website. Please register at <http://www.ga.wa.gov/webs/>, under the specific commodity codes listed above and any other commodity code for which you would like to receive notification of future bidding opportunities.

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# 1. INTRODUCTION

## 1.1. PURPOSE AND BACKGROUND

### **Purpose:**

The Office of Superintendent of Public Instruction (hereafter referenced as "OSPI") acting on behalf of the SMARTER Balanced Assessment Consortium (hereafter referenced as the "CONSORTIUM") is initiating this Request for Proposal (RFP) to solicit proposals from organizations (hereafter referenced as the "PROPOSER") interested in participating in the CONSORTIUM's grant from the U.S. Department of Education's *Race to the Top Assessment Program* (Exhibit A). The CONSORTIUM is a collaborative of states mutually aligned to generating the assessment tools and instructional resources that affiliated states can access as part of the federal government's and each member state's education reform efforts. The purpose in this RFP is contracting with a communications services entity that will support the objectives of the CONSORTIUM and will provide quality communications services by:

- Using an array of methods for the collection and tracking of the communications needs of stakeholders;
- Drawing upon a variety of media to address those needs;
- Developing and implementing an effective communications strategy; and
- Serving as an advising partner to the CONSORTIUM's leadership on appropriate communications issues.

A successful procurement shall result in the awarding of a contract between OSPI and the successful service provider (hereafter referenced as "CONTRACTOR".)

### **Background:**

Authorized under the American Recovery and Reinvestment Act of 2009 (ARRA), the Race to the Top Assessment Program provides funding to consortia of states to support the development and implementation of new common high-quality assessments that are: 1) aligned with the CONSORTIUM's common set of college- and career-ready, K–12 standards (the basis of which will be the Common Core State Standards released by the Council of Chief State School Officers and the National Governors Association, refer to Exhibit B), 2) valid and instructionally useful, 3) provide accurate information about what students know and can do, and 4) measure student achievement against standards or expectations designed to ensure that all students gain the knowledge and skills needed to succeed in college and the workplace. Over the past decade, state assessment results have brought much-needed visibility to disparities in achievement among groups of students and helped meet increasing demand for data that can be used to improve teaching and learning. These new assessments are intended to play a critical role in educational systems providing administrators, educators, parents, and students the data and information needed to continuously improve teaching and learning.

To fully meet the twin needs of accountability and instructional improvement, however, states need assessment systems that are based on standards designed to prepare students for college and the workplace, and that more validly measure what students know and can do. Further, states need assessment systems that better reflect good

instructional practice and support a culture of continuous improvement in education by providing information that can be used meaningfully and in a timely way to determine school and educator effectiveness, identify professional development and support needs, improve programs, and guide instruction.

As delineated in the U.S. Department of Education's release of notice inviting applications (NIA) for the fiscal year 2010 Race to the Top Assessment Program competition in the *Federal Register* on April 9, 2010, the Comprehensive Assessment Systems grant category accomplishes this aim through the Department's plan of awarding two categories of grants:

- Comprehensive Assessment Systems grants, which provide funding for the development of new assessment systems that measure student knowledge and skills against a common set of college- and career-ready standards in mathematics and English language arts.
- High School Course Assessment Program grants, which provide funding for the development of new assessment programs that, for each course, measure student knowledge and skills against a common set of expectations that are rigorous and designed to ensure that students who pass the course assessment are on track to being college- and career-ready.

**NOTE: The focus of the CONSORTIUM is specific to the Comprehensive Assessment Systems Grants**

#### Overview of Comprehensive Assessment Systems Grants

This grant category supports the development of assessment systems by consortia of states that provide reliable, valid, and fair performance results for individuals and groups of students that can be used for accountability purposes and to guide best instructional practice. Comprehensive Assessment Systems grants provide funding for the development of new assessment systems that measure student knowledge and skills against a common set of college- and career-ready standards (as defined in the NIA) in mathematics and English language arts in a way that covers the full range of those standards, elicits complex student demonstrations or applications of knowledge and skills where appropriate, and provides an accurate measure of student achievement across the full performance continuum. Assessment systems developed with Comprehensive Assessment Systems grants must include one or more summative assessment components in mathematics and in English language arts that are administered at least once during the academic year in grades 3 through 8 and at least once in high school and that produce student achievement data and student growth data (both as defined in the NIA) that can be used to determine whether individual students are college- and career-ready (as defined in the NIA) or on track to being college- and career-ready (as defined in the NIA). In addition, assessment systems developed with Comprehensive Assessment Systems grants must assess all students, including English learners (as defined in the NIA) and students with disabilities (as defined in the NIA). Finally, assessment systems developed with Comprehensive Assessment Systems grants must produce data (including student achievement data and student growth data) that can be used to inform (a) determinations of school effectiveness; (b) determinations of individual principal and teacher effectiveness for purposes of evaluation; (c) determinations of principal and teacher professional development and support needs; and (d) teaching, learning, and

program improvement.

To be eligible for a Comprehensive Assessment Systems grant, an eligible applicant must include at least 15 states, of which at least 5 states must be governing States (as defined in the NIA). An eligible applicant receiving a Comprehensive Assessment Systems grant must ensure that the summative assessment components of the assessment system (in both mathematics and English language arts) will be fully implemented statewide in each state in the consortium no later than the 2014–2015 school year. It is the expectation of the Department of Education that states that adopt assessment systems developed with Comprehensive Assessment Systems grants will use assessments in these systems to meet the assessment requirements in Title I of the ESEA.

In addition to meeting the need for assessment systems that can be used to determine whether students are college- and career-ready, this grant category seeks to ensure that the results from those systems will, in turn, be used meaningfully by institutions of higher education (IHEs). Under this grant category, we intend to promote collaboration and better alignment between public elementary, secondary and postsecondary education systems by establishing a competitive preference priority for applications that include commitments from public IHEs or IHE systems to participate in the design and development of the consortium's final high school summative assessments and to implement policies that exempt from remedial courses and place into credit-bearing college courses students who meet the consortium-adopted achievement standard (as defined in the NIA) for those assessments. An application that addresses this priority will receive competitive preference points based on the extent to which it demonstrates strong commitment from the public IHEs or IHE systems (as evidenced by letters of intent) and on the percentage of direct matriculation students (as defined in the NIA) in public IHEs in the states in the consortium who are enrolled in those IHEs or IHE systems.

## **1.2. OBJECTIVE AND SCOPE OF WORK**

PROPOSERS supporting the objectives of this RFP will be responsible for facilitating, organizing, coordinating, and implementing a set of comprehensive communications strategies and plans for the CONSORTIUM, and for the completion of activities as assigned by the Executive Director, consistent with the personal services agreement, in efforts to fulfill the assessment development objectives of the CONSORTIUM.

The CONSORTIUM recognizes the importance of developing and adopting a coordinated communications strategy that is designed to meet the needs of its internal and external customers, and the value that a strong communications partner can bring to planning and implementing activities consistent with that strategy. The CONSORTIUM's task to develop a comprehensive common assessment system is extremely complex with many interrelated tasks and activities requiring coordination across more than thirty states and the collaborative effort of hundreds of educational professionals. A communications partner that is effective, responsive and fluid, and that can unambiguously represent the CONSORTIUM with accuracy and integrity is critical to the success of the CONSORTIUM's efforts.

### **1.3. STATE'S ROLE**

As fiscal agent for the CONSORTIUM, OSPI will assume lead responsibility for the management of all contracting activities with the CONSORTIUM's Contractor of choice. All work direction and expenditure decisions will come from the CONSORTIUM's Governing States, or as delegated to the Executive Director. All matters relating to contract and payment processing will be coordinated through OSPI.

### **1.4. CONTRACTOR QUALIFICATIONS**

#### **Minimum Qualifications**

- Must be licensed to do business in the United States of America.
- Ability to respond to customer needs in a fast-paced environment with multiple deadlines.
- Minimum 5 years demonstrated knowledge and experience with education and/or public sector clients.
- Demonstrated experience with clients having multiple customer bases.
- Ability to work with education agency staff across 30+ states.
- Demonstrated experience developing and implementing communications strategies and plans on a large scale.
- Expertise in developing and establishing a brand presence.
- Demonstrated capacity to develop and maintain Web-based resources (including but not limited to expertise with: Web sites, social media, blogs, streaming and interactive video) to meet customer needs.
- The proposal must include at least one full-time senior project manager as staff with substantial experience designing and implementing complex communications strategies.
- Demonstrated ability to connect and network with political and educational organizations in the DC metro area.

#### **Preferences**

- Preference will be afforded to vendors with headquarters or a major office in the Washington, DC metro area.
- Preference will be afforded to vendors with the capacity to include a full-time senior-level staff person who has well-established credentials in K–12 educational policy and programs, and preferably assessment. (Support for this position is pending funding at the time of release of this RFP.)

### **1.5. FUNDING**

The budget for the Communications Services contract is estimated at a maximum of \$2,200,000 for the period starting approximately May 20, 2011 through September 30, 2014.

The funding for this contract has been secured through the U.S. Department of Education award to the State of Washington, acting as fiscal agent for the CONSORTIUM.

The PROPOSER shall provide their most favorable and competitive cost estimate to perform the work.

## 1.6. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to **begin no sooner than May 20, 2011, and end on or about September 30, 2014.** Any contract awarded from this solicitation will be subject to periodic evaluations based on sustained satisfactory performance as decided by the CONSORTIUM's Executive Committee, the failure of which could be cause for OSPI to terminate the contract either mid-period or at the conclusion of a project year. Annual continuance of the contract, if any, shall be at the sole discretion of the CONSORTIUM. Contract extension beyond the original project period is possible, but will not be spelled out in the awarded contract.

## 1.7. DEFINITIONS

Definitions for the purposes of this RFP include:

**Apparent Successful Contractor** – The PROPOSER whose proposal is selected through the evaluation process as being the entity with which OSPI enters into a contract for services.

**CONSORTIUM** – The multi-state arrangement known as the “SMARTER Balanced Assessment Consortium,” collaborating on a federally-sponsored grant to develop a comprehensive assessment system aligned to the Common Core State Standards (CCSS).

**CONTRACTOR** – The entity whose proposal has been accepted by OSPI and has been awarded a fully executed, written contract with the State of Washington.

**Executive Director** – Lead staff member with reporting responsibility to the Consortium's executive committee. Task responsibilities include: (1) providing strategic leadership to the Executive Committee and Governing States, (2) collaborating with Consortium's project management partner to monitor development of the assessment system components, (3) serving as spokesperson for the Consortium, and (4) facilitating interactions amongst the groups comprising the Consortium's governance structure.

**OSPI** – Office of Superintendent of Public Instruction is the agency of the State of Washington that is issuing this RFP.

**Proposal** – A formal offer submitted in response to this solicitation.

**PROPOSER** – The entity submitting a proposal in order to attain a contract with OSPI.

**Request for Proposals (RFP)** – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose

of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.

**RFP Coordinator** – The individual designated as the sole point of contact in OSPI for this procurement, identified in Section 5.1, below.

## 1.8. ADA

OSPI complies with the Americans with Disabilities Act (ADA). PROPOSERS may contact the RFP Coordinator to receive this Request for Proposals in Braille or on tape.

## 2. TECHNICAL REQUIREMENTS

### OVERVIEW

The CONTRACTOR will work with the CONSORTIUM's Executive Director and its executive committee and serve as the CONSORTIUM's communications partner to provide communications advice, materials, and support as necessary to fully implement a common assessment grant awarded by the U.S. Department of Education.

A priority of the CONSORTIUM's commitment to its member states is to provide clear, accurate, and timely communication of standards, policies, and practices. This is essential for successful implementation of the new system within and across states. Effective communication is critical in the short term to signal change, and over the longer term to build continuing support for reform. The CONSORTIUM is committed to transparency and clarity in communicating to all stakeholders (e.g., legislators, policymakers, IHEs, the workplace, community members, parents, educators, and students) the principles of the CONSORTIUM, the purposes of each assessment component in a balanced system, and the practices and intended outcomes of this assessment system.

**The PROPOSER is expected to provide an explanation of how the Technical Requirements listed below will be met. The numbering and labeling of each Technical Requirement should comply with the numbering in this section.**

### 2.1 COMMUNICATIONS STRATEGIC PLAN

- Develop a detailed and overarching communications strategy that includes the articulation of goals for branding the CONSORTIUM's products and for identifying and meeting the needs of its internal member states and its external stakeholders. Timeline should include sufficient detail and displays to provide convincing evidence that deliverables will be provided on time, within budget, and in a manner that is financially sustainable over time. The description must detail project deliverables and the means of tracking assigned tasks, plus the approach to identify, manage, and mitigate risks associated with the project.
- The communications strategy must include a reliable means of identifying the communications needs of districts and state agencies and must be customizable to

meet the needs of districts and agencies for the purpose of promoting broader understanding of the Common Core State Standards (CCSS) by a variety of stakeholders, including: the general public; education policymakers; higher education; business leaders; education stakeholder and child advocacy groups; K–12 educators; and parents.

- The development of the communications strategy must also include a reliable means of identifying the communications needs of the CONSORTIUM’s external customers, which includes: parents, professional organizations and advocacy groups with a focus on public education, general public organizations, offices in the Federal government, US legislators and their staff, and foundations and charitable organizations.
- The communications strategy must include multiple points of access to information about the CONSORTIUM, including but not limited to print media, streaming audio and video presentations, and links to common social media, blogs, and podcasts.
- Create and maintain a detailed project plan that describes the full scope of work in which the PROPOSER is engaged. Project planning should include multi-state and within-state activities. Plans should be amended over time to include any unique within-state activities necessary to implement consortium deliverables.
- Evaluate the effectiveness of and update the strategies at seven (7) milestone points across the life of the contract. In roughly six-month intervals, using the schedule below, evaluate the success of the strategic efforts and, as necessary, re-define the communications strategy to respond to changing needs of internal and external customers. Evaluations and revised plans are to be presented to the CONSORTIUM Executive Committee:
  - i. October 15, 2011
  - ii. June 15, 2012
  - iii. December 15, 2012
  - iv. June 15, 2013
  - v. December 15, 2013
  - vi. June 15, 2014
  - vii. September 15, 2014

## **2.2 CONSORTIUM BRANDING**

- Analyze the current status of the CONSORTIUM’s brand identity and advise the Executive Committee on strategies to improve/increase its brand exposure. Assist the CONSORTIUM in the identification and elaboration of its unique features and develop branding strategies that communicate those strengths.
- Develop a systematic “look and feel” for the CONSORTIUM and the materials it uses for all reports, displays, and presentations.
- Evaluate and provide recommendations for design and features to improve the

CONSORTIUM's public Web site and its internal Web page, used by members for internal documents and messages.

- Implement design and features changes to the CONSORTIUM's Web sites as approved by the Executive Director.
- Develop a systematic means for the CONSORTIUM to monitor Web usage; include Web metrics in regular reviews and evaluations, and make recommendations based on those metrics.
- Recommend and, upon CONSORTIUM's Executive Director approval, produce regular communications to audiences using a variety of media, including but not limited to clipped, streaming and interactive video, animation, and PowerPoint presentations.
- Establish the CONSORTIUM as a trustworthy source for information about the Common Core State Standards, about college and career readiness, and about the CONSORTIUM's assessment system.

### **2.3 COMMUNICATIONS SUPPORT**

- Design, develop and implement a CONSORTIUM communications database and network, encompassing individuals and organizations, their history of interactions with the CONSORTIUM, their contact information, and other details pertinent to their communication needs, and the past and future engagement with the CONSORTIUM.
- Develop multimedia communication tools that states and local school districts can use for their communications purposes. Some of these tools may be generic of a generic sort that can be used on several occasions; some may be one-time-only supports that are specific to a particular event. These tools would include, but not be limited to:
  - Timelines for public release of informational materials;
  - An overview of communication processes and products (e.g., arrangements for media coverage, talking points, and illustrations needed for all spokespersons within the Consortium);
  - A protocol for national press conferences, including state and Consortium contacts for multi-state media releases;
  - Materials for public consumption, such as templates for PowerPoint presentations, brochures, pamphlets, information letters, and newsletters; and
  - Access to a CONSORTIUM-developed and -managed Web site that provides communication materials, technical reports, and important notices about CONSORTIUM projects/initiatives.
- Assist with the drafting and editing of important documents that are developed for

broad public audiences, such as press releases, brochure materials, position papers, project descriptions, etc.

- Participate in all CONSORTIUM management meetings, including weekly communications team conference calls, twice-monthly Executive Committee conference calls, twice-monthly Governing States conference calls, monthly Advisory States calls, and quarterly Executive Committee retreats, whether in person, by conference call, or via WebEx format.
- Provide a management structure and level of staffing necessary to ensure a level of collaboration satisfactory to the CONSORTIUM.

## **2.4 SUPPORT FOR REPORTING SYSTEMS**

- Provide visual design and technical assistance to the CONSORTIUM’s Reporting Work Group and the Technology Work Group, with respect to the development, design, and delivery of reporting systems that are clear, engaging, easy to navigate, easy to understand, and compelling to use.
- Provide expertise and resources to the Reporting Work Group with regard to the suitability and utility of prototype reports for various audiences. Provide a systematic means by which the work group can acquire useful feedback from potential audiences on the quality of the reports it designs.

## **3. MANAGEMENT PROPOSAL**

### **OVERVIEW**

The CONSORTIUM seeks an experienced communications partner to capable of fully providing the communications needs of the CONSORTIUM, its state members, and its various stakeholders.

To meet this need, the CONSORTIUM will be giving strong consideration to entities with demonstrated experience in: identifying and addressing the communications needs of multiple stakeholders; providing communications services in the K-12 educational sphere; and using multiple media avenues to convey consistent and concise messaging about the CONSORTIUM.

**The PROPOSER must specify the person (or persons) who will be the Program Manager/Project Director and contact for the project.** The CONSORTIUM will have final approval of the Program Manager/Project Director. A Program Manager/Project Director shall have authority and responsibility for overall quality control of the PROPOSER’s project including follow-through on all tasks, whether assigned to other managers, sub-contractors, and consultants. A Program Manager/Project Director will assume responsibilities for all oral or written correspondence to task managers, sub-contractors, and consultants as well as timely completion of all activities for which Contractor is responsible. The Program Manager/Project Director must be readily

available to respond to questions or issues as they arise, whether by phone, text messaging, or email.

The proposed Program Manager/Project Director must have the authority necessary to coordinate and establish work priorities, on behalf of the Contractor, for all assigned personnel, including those of any sub-contractors, associated with project tasks. Stability in the Program Manager/Project Director's role is essential, but OSPI reserves the right to request a change in Program Manager/Project Director in the event of substantial unsatisfactory performance. Any subsequent changes in Program Manager/Project Director contemplated by Contractor must be reviewed and approved in consultation with OSPI's representative to the CONSORTIUM.

The PROPOSER will also be required to provide statistical information detailing elements of the organization's history of staff turnover, average employee tenure, average project tenure, and average number of years of experience employees have in the education field.

To assure unambiguous support to the CONSORTIUM, the PROPOSER is required to list any potential conflict of interest it may have in conducting this work including, but not limited to, existing contracts, possible bids it may submit for work with other consortia, government agencies, or other organizations.

The PROPOSER must indicate whether or not it currently provides or anticipates submitting a proposal to provide communications support to:

- A department of education for a state;
- A federally-funded assessment activity;
- A testing publisher or educational materials publisher.

## **PROJECT MANAGEMENT & STAFFING**

The PROPOSER will provide detailed information on the following elements associated with managing each project:

- Management Design
- Roles and Responsibilities
- Staff Assignment

### **A. MANAGEMENT DESIGN**

PROPOSER will detail the structure associated with executing and fulfilling projects, providing an organization chart (or charts) of the:

- Reporting structure by role.
- Reporting structure by task (which department takes direction from whom on the associated task).
- Reporting and decision-making structure associated with problem resolution (who can speak for the Contractor in terms of resolving unforeseen issues or unanticipated tasks and budget/cost structuring).

The intent is to understand the day-to-day functionalities engaged in fulfilling the

contract, not just company officers and mid-level managers.

## **B. ROLES AND RESPONSIBILITIES**

The PROPOSER will detail the specific roles required to fulfill the project and the responsibilities associated with the various project tasks. Details will encompass not only direct work responsibilities but also the interfaces with other defined roles and parties in moving the project through a given task or from one task to the next. Additionally, client interfaces will be identified where the PROPOSER expects the CONSORTIUM or other parties to be involved or assume responsibility in a given task. The intent is to understand the “chain of custody” for a task and identify where connections are critical to ensure smooth transitions toward implementation of plans.

Additionally, the PROPOSER will provide a chart listing **time commitments by task and individual**, in terms of actual hours required and associated dates that delineate the project work. The intent is for the CONSORTIUM leadership and other project team members to understand the expectation of each individual’s time commitment to the project and the PROPOSER’s interpretation of the personnel resource commitment anticipated to support the scope of work for the project. Exhibit C is provided as the format for submission of this information.

## **C. STAFF ASSIGNMENT**

The PROPOSER will identify the primary staff member to be assigned to each role and provide a resume relating both applicable skills and previous work experience on projects similar in nature to the work requested in this RFP. The PROPOSER should be prepared to offer alternative candidates for key positions for purposes of identifying potential back-up for primary staff and possible replacement should the CONSORTIUM or other project team members object to specific personnel participation. For any alternate proposed, a resume must also be provided. Resumes can either be embedded or attached as an appendix to the proposal.

Proposed staff members and alternates must have demonstrable skills and experience appropriate for the project and include, but not be limited to:

- Qualifications for their specific role.
- An understanding of education communications issues.
- Skills in translating complex assessment terms and procedures into easy-to-understand language.
- Expertise in the use of various media relevant to the work area assigned.

Should a primary candidate not exist, the PROPOSER is expected to acknowledge the situation and provide a plan to meet the objectives of the project. The plan should detail both the criteria for recruitment of qualified candidates and requisite training needed to adequately meet the consortium’s needs. The plan should be detailed in both the chart provided as Exhibit C and in the resume portion of associated with this section.

At the time of contracting, if the consortium's Governing Committee is not satisfied with proposed personnel assignments of the PROPOSER, the CONSORTIUM, through OSPI as fiscal agent, will be allowed to retain the services of qualified service providers at the PROPOSER's expense. At any time during the contracted period, if it becomes necessary for the CONTRACTOR to add or replace professional staff, the CONSORTIUM will have the right to participate in the interview process, and the CONSORTIUM's Executive Committee shall have approval authority regarding the selection or appointment of a candidate for the vacancy. If the CONSORTIUM believes a staff member of the CONTRACTOR or one of its sub-contractors needs to be removed from the project, as fiscal agent, OSPI will provide 30-day written notice of the request to allow the CONTRACTOR the opportunity to propose a suitable alternative; corrective action will be implemented within 30 days of agreement on a plan.

Additionally, the PROPOSER will make available all similar information of anticipated sub-contractors intended to participate in the project efforts.

#### **4. COST PROPOSAL SPECIFICATIONS**

In order to better compare proposals, we are requesting that budgets be presented according to the tables given in Exhibit D.

A detailed cost proposal allows OSPI to consider bids while deliberating four distinct circumstances:

- a) Evaluation of proposals and the award of any contract will be based upon the reasonableness of costs to be incurred and charged to OSPI.
- b) OSPI holds to the prerogative that any or all of the provisions of this RFP may be conducted solely by OSPI or other Contractors known to OSPI.
- c) OSPI will only make payments on a reimbursement basis upon satisfactory performance and/or provided deliverables.
- d) In the event of termination of any contract, the amount due and payable to the CONTRACTOR for any partial performance must be ascertainable.

Payment to the CONTRACTOR will be based on value of performance as indicated by a CONTRACTOR's certification of costs incurred.

Anticipated funding for any contract awarded pursuant to this RFP shall be provided for fiscal year 2011 subject to legislative expenditure authority. Continued support consistent with contracted duties is expected for the duration of the contract. It is anticipated that a contract awarded through this RFP will be based on time and materials subject to adequate legislative appropriation.

OSPI is particularly interested in proposals that, in responding to the specifications set forth in this RFP, make optimum use of available resources in a cost-effective manner. Although cost is a consideration, OSPI is not bound to select a Contractor solely on the basis of low bid. To assist OSPI in selecting the proposal that will best accomplish the

objectives of the program within the resources available, the PROPOSER shall identify and estimate all costs for performing the tasks necessary to accomplish the deliverables of the RFP and subsequent contract. The costs associated with each major component or significant work product must be clearly and separately identified. The cost proposal must detail all expenses that will be billed to OSPI in the event of a contract award. The PROPOSER should include a suggested payment schedule based on monthly invoicing. **The CONTRACTOR shall be responsible for payment of all applicable taxes due for services rendered under any contract resulting from this RFP and should be accounted for in the cost proposal.**

The PROPOSER shall provide the budget in electronic format, specifically an Excel spreadsheet.

## 5. GENERAL INFORMATION FOR PROPOSERS

### 5.1. RFP COORDINATOR

The RFP Coordinator is the sole point of contact in OSPI for this procurement. All communication between the PROPOSER and OSPI upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	<b>Michael Middleton</b>
Street Address	<b>600 Washington Street SE</b>
City, State, Zip Code	<b>Olympia WA 98501-1359</b>
Mailing Address	<b>PO Box 47200</b>
City, State, Zip Code	<b>Olympia WA 98504-7200</b>
Phone Number	<b>360.725.6434</b>
Fax Number	<b>360.725.0424</b>
E-Mail Address	<a href="mailto:michael.middleton@k12.wa.us"><b>michael.middleton@k12.wa.us</b></a>

Any other communication will be considered unofficial and non-binding on OSPI. PROPOSERS and potential PROPOSERS are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the PROPOSER.

### 5.2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposal	<b>February 25, 2011</b>
Letter of Intent to Propose	<b>March 11, 2011</b>
Last Date for Questions Regarding RFP	<b>March 11, 2011</b>
Release Q&A plus RFP Addendum (as needed)	<b>March 17, 2011</b>
Proposals Due	<b>March 25, 2011</b>
Evaluate written proposals	<b>March 28–April 8, 2011</b>
Announce Finalist Proposer(s)	<b>April 8, 2011</b>
Oral Presentations by Finalists	<b>April 12 or 13, 2011</b>
Announce “Apparent Successful Contractor” (send fax/email notification to unsuccessful proposers)	<b>April 19, 2011</b>

Hold Debriefings (if requested)	<b>April 20, 2011</b>
Negotiate Contract	<b>April 27–29, 2011</b>
File Contract with OFM	<b>May 4, 2011</b>
Begin Contract Work	<b>May 20, 2011</b>

OSPI reserves the right to revise the above schedule.

### **5.3. LETTER OF INTENT TO BID**

A Letter of Intent to Bid in response to this RFP must be received by OSPI (RFP Coordinator identified above) by **4:30PM (Pacific Standard Time) March 11, 2011**. This letter may be sent via fax, email attachment, or postal or express courier service. All prospective PROPOSERS should submit a Letter of Intent to Bid; however, it is not mandatory.

### **5.4. PRE-PROPOSAL QUESTIONS**

Written questions regarding this procurement may be submitted in advance to the RFP Coordinator. As indicated above, OSPI shall be bound only to written answers to questions. OSPI will receive questions up to **4:30PM (Pacific Daylight Savings Time) March 11, 2011**. Responses will be distributed by **4:30PM (Pacific Daylight Savings Time) March 17, 2011** to all PROPOSERS that have submitted Letters of Intent to Bid. In addition, on or before **March 20, 2011** a copy of the questions and answers will be posted as addenda to the OSPI website as well as released via WEBS to those registered entities.

### **5.5. SUBMISSION OF PROPOSALS**

PROPOSERS are required to submit fifteen (15) copies of their proposal. One (1) copy must be hardcopy with original signatures while the remaining fourteen (14) copies are to be provided electronically on a compact disc (CD).

Whether mailed or hand delivered, proposals must be received by OSPI no later than **4:30 p.m. (Pacific Daylight Savings Time)** in Olympia, Washington, on **March 25, 2011**. The proposal is to be sent to the RFP Coordinator at the address noted in Section 5.1. The envelope should be clearly marked to the attention of the RFP Coordinator, who is OSPI's sole point of contact for this procurement.

PROPOSERS mailing proposals should allow normal mail delivery time to ensure timely receipt of their proposals by the RFP Coordinator. PROPOSERS who hand deliver proposals should allow time for traffic congestion. PROPOSERS assume the risk for the method of delivery chosen. OSPI assumes no responsibility for delays caused by any delivery service.

Late proposals will not be accepted and will be automatically disqualified from further

consideration. The proposals must respond to the procurement requirements. Do not respond by referring to material presented elsewhere. The proposal must be complete and must stand on its own merits.

Failure to respond to any portion of the procurement document may result in rejection of the proposal as non-responsive. All proposals and any accompanying documentation become the property of OSPI and will not be returned.

OSPI will announce to one or more Finalists on or about **April 8, 2011** that they will be required to provide an in-person presentation on **April 12 or April 13, 2011**. It is the intent of OSPI to select the Apparent Successful Contractor from the Finalists; however, OSPI reserves the right to select the Apparent Successful Contractor from among the entire pool of PROPOSERS.

## **5.6. PROPRIETARY INFORMATION/PUBLIC DISCLOSURE**

Proposals submitted in response to this competitive procurement shall become the property of OSPI.

All proposals received shall remain confidential until the contract, if any, resulting from this RFP is signed by the Contracts Administrator of OSPI and the Apparent Successful Contractor; thereafter, the proposals shall be deemed public records as defined in RCW 42.56.

Any information in the proposal that the PROPOSER desires to claim as proprietary and exempt from disclosure under the provisions of RCW 42.56 must be clearly designated. The page must be identified and the particular exception from disclosure upon which the PROPOSER is making the claim. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on the lower right hand corner of the page.

OSPI will consider a PROPOSER's request for exemption from disclosure; however, OSPI will make a decision predicated upon RCW 42.56. Marking the entire proposal exempt from disclosure will not be honored. The PROPOSER must be reasonable in designating information as confidential. If any information is marked as proprietary in the proposal, such information will not be made available until the affected proposer has been given an opportunity to seek a court injunction against the requested disclosure.

A charge will be made for copying and shipping, as outlined in RCW 42.56. No fee shall be charged for inspection of contract files, but twenty-four (24) hours' notice to the RFP Coordinator is required. All requests for information should be directed to the RFP Coordinator.

## **5.7. REVISIONS TO THE RFP**

In the event it becomes necessary to revise any part of this RFP, notification of RFP

addenda will be provided via e-mail to all who submitted a Letter of Intent to Bid.

RFP addenda will be published on the OSPI web site, at <http://www.k12.wa.us/RFP/>. For this purpose, the published questions and answers as described in Section 5.4 and any other pertinent information shall be considered an addendum to the RFP and also placed on the Web site. Additionally, all addenda referred to above will be released on WEBS for all registered entities.

It will be the responsibility of interested PROPOSERS to check the website periodically for RFP addenda and updates. For this purpose, the published PROPOSER questions/agency answers and any other pertinent information shall be considered an addendum to the RFP and also placed on the website.

OSPI also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract.

### **5.8. MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION**

In accordance with the legislative findings and policies set forth in chapter 39.19 RCW, the state of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this solicitation or on a sub-contractor basis. However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

The established annual procurement participation goals for MBE is 8 percent and, for WBE, 4 percent, for this type of project. These goals are voluntary. PROPOSERS may contact OMWBE at 360/753-9693 to obtain information on certified firms.

### **5.9. ACCEPTANCE PERIOD**

The associated terms submitted with the proposal must provide 90 days for acceptance by OSPI from the due date for receipt of the proposals.

### **5.10. RESPONSIVENESS**

All proposals will be reviewed by the RFP Coordinator to determine compliance with administrative requirements and instructions specified in this RFP. The PROPOSER is specifically notified that failure to comply with any part of the RFP may result in rejection of the proposal as non-responsive.

OSPI also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

### **5.11. MOST FAVORABLE TERMS**

OSPI reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be submitted initially on the most favorable terms which the PROPOSER can propose. There will be no best and final offer procedure. OSPI does reserve the right to contact a PROPOSER for clarification of its proposal.

The PROPOSER should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some, or all, of the PROPOSER's proposal. It is understood that the proposal will become a part of the official procurement file on this matter without obligation to OSPI.

### **5.12. CONTRACT AND GENERAL TERMS & CONDITIONS**

The Apparent Successful Contractor will be expected to enter into a contract which is substantially the same as the sample contract and its general terms and conditions attached as Exhibit E. In no event is a PROPOSER to submit its own standard contract terms and conditions in response to this solicitation. The PROPOSER may submit exceptions as allowed in the Certifications and Assurances section, Exhibit F to this solicitation. OSPI will review requested exceptions and accept or reject the same at its sole discretion.

Additionally, the budget, scope of work and/or timeline may need to be reviewed and approved by the U.S. Department of Education upon finalization of the grant award. That being the case, the CONSORTIUM cannot anticipate such amended elements impacting the scope of work delineated by this RFP, thus with submission of bid, PROPOSER is committing to complete the scope of work as detailed. Any action on the part of PROPOSER to modify the scope of work and associated budget due to grant award amendment will be construed as a breach of contract.

### **5.13. COSTS TO PROPOSE**

OSPI will not be liable for any costs incurred by the PROPOSER in preparation of a proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

### **5.14. NO OBLIGATION TO CONTRACT**

This RFP does not obligate the State of Washington or OSPI, acting on behalf of the CONSORTIUM, to contract for services specified herein. Additionally, although any contract would be held by state of Washington (OSPI), when appropriate the CONSORTIUM anticipates transferring fiscal authority to a new independent non-profit

organization to be created as a product of the grant.

#### **5.15. REJECTION OF PROPOSALS**

OSPI reserves the right at its sole discretion to reject any and all proposals received without penalty and not to issue a contract as a result of this RFP.

#### **5.16. COMMITMENT OF FUNDS**

The OSPI Contracts Administrator (or her delegate) is the only individual who may legally commit OSPI to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

#### **5.17. STATEWIDE CONTRACTOR PAYMENT REGISTRATION**

PROPOSERS awarded contracts as a result of this RFP will be required to register as a Statewide Vendor (SWV). The SWV file is a central vendor file maintained by the Office of Financial Management for use by Washington State agencies in processing vendor payments. This allows you, as a vendor, to receive payments from all participating state agencies by direct deposit, the State's preferred method of payment. While registration in the SWV is mandatory, the vendor is NOT required to participate in the direct deposit program and therefore is not required to submit banking information. Please go to <http://www.ofm.wa.gov/accounting/vendors.asp> for online registration.

#### **5.18. INSURANCE COVERAGE**

Prior to a contract being executed, the PROPOSER is to furnish OSPI with a certificate(s) of insurance executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below.

The CONTRACTOR shall, at its own expense, obtain and keep in force insurance coverage which shall be maintained in full force and effect during the term of the contract. The CONTRACTOR shall furnish evidence in the form of a Certificate of Insurance that insurance shall be provided, and a copy shall be forwarded to OSPI within fifteen (15) days of the contract effective date.

## **Liability Insurance**

- 1) **Commercial General Liability Insurance:** Contractor shall maintain general liability (CGL) insurance and, if necessary, commercial umbrella insurance, with a limit of not less than \$1,000,000 per each occurrence. If CGL insurance contains aggregate limits, the General Aggregate limit shall be at least twice the “each occurrence” limit. CGL insurance shall have products-completed operations aggregate limit of at least two times the “each occurrence” limit. CGL insurance shall be written on ISO occurrence from CG 00 01 (or a substitute form providing equivalent coverage). All insurance shall cover liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and contain separation of insureds (cross liability) condition.

Additionally, the Contractor is responsible for ensuring that any sub-contractors provide adequate insurance coverage for the activities arising out of subcontracts.

- 2) **Business Auto Policy:** As applicable, the Contractor shall maintain business auto liability and, if necessary, commercial umbrella liability insurance with a limit not less than \$1,000,000 per accident. Such insurance shall cover liability arising out of “Any Auto.” Business auto coverage shall be written on ISO form CA 00 01, 1990 or later edition, or substitute liability form providing equivalent coverage.

## **Employers Liability (“Stop Gap”) Insurance**

In addition, the Contractor shall buy employers liability insurance and, if necessary, commercial umbrella liability insurance with limits not less than \$1,000,000 each accident for bodily injury by accident or \$1,000,000 each employee for bodily injury by disease.

## **Additional Provisions**

Above insurance policy shall include the following provisions:

1. **Additional Insured.** The State of Washington, Office of Superintendent of Public Instruction, its elected and appointed officials, agents and employees shall be named as an additional insured on all general liability, excess, umbrella and property insurance policies. All insurance provided in compliance with this contract shall be primary as to any other insurance or self-insurance programs afforded to or maintained by the State.
2. **Cancellation.** State of Washington, Office of Superintendent of Public Instruction, shall be provided written notice before cancellation or non-renewal of any insurance referred to therein, in accord with the following specifications. Insurers subject to 48.18 RCW (Admitted and Regulation by the Insurance Commissioner): The insurer shall give the State 45 days advance notice of cancellation or non-renewal. If cancellation is due to non-payment of premium, the State shall be given 10 days advance notice of cancellation. Insurers subject to 48.15 RCW (Surplus lines): The State shall be given 20 days advance notice of cancellation. If cancellation is due to non-payment of premium, the State shall be given 10 days advance notice of cancellation.
3. **Identification.** Policy must reference the State’s contract number and the agency name.
4. **Insurance Carrier Rating.** All insurance and bonds should be issued by companies admitted to do business within the State of Washington and have a rating of A-, Class VII or better in the most recently published edition of Best’s Reports. Any exception shall be reviewed and approved by the OSPI Risk Manager, or the Risk Manager for the State of Washington, before the contract is accepted or work may begin. If an insurer is not admitted, all insurance policies and procedures for issuing the insurance policies must comply with chapter 48.15 RCW and

284-15 WAC.

5. **Excess Coverage.** By requiring insurance herein, the State does not represent that coverage and limits will be adequate to protect Contractor, and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the State in this contract.

**Worker's Compensation Coverage**

The Contractor will at all times comply with all applicable workers' compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the full extent applicable. The State will not be held responsive in any way for claims filed by the Contractor or their employees for services performed under the terms of this contract.

## **6. PROPOSAL CONTENTS**

Proposals must be submitted on eight and one-half by eleven (8 1/2 x 11) inch paper with tabs separating the major sections of the proposal. The four major sections of the proposal are to be submitted in the order noted below:

1. Letter of Submittal, including signed Certifications and Assurances (Exhibit F to this RFP).
2. Technical Requirements (Refer to Section 2 of this RFP)
3. Management Proposal (Refer to Section 3 of this RFP)
4. Cost Proposal (Refer to Section 4 of this RFP)

Proposals must provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the proposal, but should assist the PROPOSER in preparing a thorough response.

Items in this section marked “mandatory” must be included as part of the proposal for the proposal to be considered responsive; however, these items are not scored. Items marked “scored” are those that are awarded points as part of the evaluation conducted by the evaluation team.

### **6.1. LETTER OF SUBMITTAL (MANDATORY)**

The Letter of Submittal and the attached Certifications and Assurances form (Exhibit F to this RFP) must be signed and dated by a person authorized to legally bind the PROPOSER to a contractual relationship, e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include by attachment the following information about the PROPOSER and any proposed sub-contractors:

1. Name, address, principal place of business, telephone number, fax number and e-mail address of legal entity or individual with whom contract would be written.
2. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.).
3. Legal status of the PROPOSER (sole proprietorship, partnership, corporation, etc.) and the year the entity was organized to do business as the entity now substantially exists.
4. Federal Employer Tax Identification number or Social Security Number and the Washington Uniform Business Identification (UBI) number issued by Washington State Department of Revenue.
5. Location of the facility from which the PROPOSER would operate.
6. Identify any State employees or former State employees employed or on the firm’s governing board as of the date of the proposal. Include their position and responsibilities within the PROPOSER’s organization. If following a review of this information, it is determined by OSPI that a conflict of interest exists, the PROPOSER may be disqualified from further consideration for the award of a

contract.

## 6.2. TECHNICAL REQUIREMENTS (SCORED)

The Proposal to meet the Technical Requirements must contain a comprehensive description of services **for each of the four requirements** described in Section 2. The proposal for each requirement must include the following elements:

- A. Project Approach/Methodology** – Include a complete description of the PROPOSER’s approach and methodology for the requirement. This element should convey PROPOSER’s understanding of the requirement, a description of how the project’s needs will be met (samples of work added as appendices are appropriate), and a detailed narrative regarding how the PROPOSER would incorporate the expectations into completion of each of the required deliverables.
- B. Work Plan** – Include all necessary tasks, services, activities, etc. necessary to accomplish the scope of the requirement defined in Section 2. This element of the technical requirements must contain sufficient detail to convey to members of the evaluation team the PROPOSER’s knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of CONSORTIUM staff. The PROPOSER may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.
- C. Project Schedule** – Include a schedule of activities with key milestone dates, indicating when the components of the work will be completed and when deliverables, if any, will be provided.
- D. Deliverables** – Fully describe deliverables to be submitted under the proposed contract.
- E. Outcomes and Performance Measurement** – Describe the impacts/outcomes the PROPOSER intends for the CONSORTIUM to realize as a result of the delivery of these services, including how these outcomes would be monitored, measured and reported to the CONSORTIUM leadership.  
**Note: Mere repetition of the work statements from Parts A–D will not be considered responsive.**
- F. Risks** – Define risks the PROPOSER identifies as being significant to the success of the project, including particular challenges the PROPOSER may face addressing the technical requirement. Include how each risk/challenge would effectively be monitored and managed, including reporting of risks to the CONSORTIUM leadership.

## 6.3. MANAGEMENT PROPOSAL

### A. Experience/Qualifications of the Project Management (SCORED)

1. Indicate through relevant experience the quality, qualifications, and role of the PROPOSER (and any of its intended sub-contractors) evidence of its ability to fulfill the objectives of the project. Evidence would include, but not be limited to PROPOSER's mission, date of founding, size, experience (including past success in implementing similar projects), and key personnel assigned to this project (including their names, roles, percent of time dedicated to this project, and experience in managing similar projects).
2. Provide a list of contracts the PROPOSER has had during the last five years that relate to the PROPOSER's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, email addresses, and fax numbers.
3. Identify the person or persons who will provide project management and direction for the entire project, including a description of that person's (persons') role in the project, direct reports within the PROPOSER organization, and level of authority for overall quality control of the PROPOSER's project including follow-through on all tasks, whether assigned to other managers, sub-contractors, and consultants. Include the resume(s) for this person(s).
4. Provide a description of the proposed management structure and internal controls to be used during the course of the project, including any sub-contractors. Provide an organizational chart of your firm showing lines of authority for personnel involved in performance of the contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.
5. Provide a detailed description of the process and procedures you propose to use should the CONSORTIUM or OSPI feel that an issue or concern needs to be escalated within your organization.

## **B. Structure/Internal Controls for Project Teams (SCORED)**

For each Technical Requirement described in Section 2 of this RFP, provide a description of the proposed project team and the management structures in place that provide assurance that tasks will be properly initiated and completed on time.

Identify the staff, including sub-contractors, who will be assigned to each Technical Requirement, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide a resume for each named staff, which includes information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The PROPOSER must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the CONSORTIUM.

### **C. References (SCORED)**

List names, addresses, telephone numbers, email addresses, and fax numbers of four business references for whom work of a similar nature has been accomplished and briefly describe the type of service provided. The PROPOSER must grant permission to OSPI to contact the references. Do not include current OSPI staff or CONSORTIUM states as references. References will be contacted for the top-scoring proposal(s) only.

### **D. Related Information (MANDATORY)**

1. If the PROPOSER or any sub-contractor contracted with the state of Washington during the past 24 months, indicate the name of the agency, the contract number and project description and/or other information available to identify the contract.
2. If the PROPOSER's staff or sub-contractor's staff was an employee of the state of Washington during the past 24 months, or is currently a Washington State employee, identify the individual by name, the agency previously or currently employed by, job title or position held and separation date.
  - If the PROPOSER has had a contract terminated for default in the last five years, describe such incident. Termination for default is defined as: notice to stop performance due to a determination of non-performance or poor performance by an agency served by the PROPOSER, where the issue of performance was either: (a) not litigated due to inaction on the part of the PROPOSER, or (b) litigated and such litigation determined that the PROPOSER was in default.
  - Submit full details of the terms for default including the other party's name, address, and phone number. Present the PROPOSER's position on the matter. OSPI will evaluate the facts and may, at its sole discretion, reject the proposal on the grounds of the past experience. If no such termination for default has been experienced by the PROPOSER in the past five years, so indicate.
  - PROPOSERS are to submit contact information and scope of work summary associated with contracts held over the last 10 years that relate to the field of education. If no contracts of this nature have been held, so indicate.

The PROPOSER will also be required to provide statistical information detailing elements of the organization's history of staff turnover, average employee tenure, average project tenure, and average number of years of experience employees have in the education field.

To assure unambiguous support to the CONSORTIUM, the PROPOSER is required to list any potential conflict of interest it may have in conducting this work including, but not limited to, existing contracts, possible bids it may submit for work with other consortia, government agencies or other organizations.

The PROPOSER must indicate whether or not it currently provides or anticipates submitting a proposal to provide communications support to:

- A department of education for a state;
- A federally-funded assessment activity;
- A testing publisher or educational materials publisher.

#### **6.4. COST PROPOSAL**

The evaluation process is designed to award this procurement not necessarily to the PROPOSER of least cost, but rather to the PROPOSER whose proposal best meets the requirements of this RFP. However, PROPOSERS are encouraged to submit proposals that are consistent with state government efforts to conserve state resources.

##### **A. Identification of Costs (SCORED)**

Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The PROPOSER is to submit a fully detailed budget including staff costs, administrative costs, travel costs, and any other expenses necessary to accomplish the tasks and to produce the deliverables under the contract. The CONTRACTOR will be required to collect and pay Washington State sales tax, as applicable.

Costs for sub-contractors are to be broken out separately. The PROPOSER shall note if any sub-contractors are certified by the Office of Minority and Women's Business Enterprises.

##### **B. Computation**

The score for the cost proposal will be computed by dividing the lowest cost bid received by the PROPOSER's total cost. Then the resultant number will be multiplied by the maximum possible points for the cost section.

## 7. EVALUATION AND CONTRACT AWARD

### 7.1. EVALUATION PROCEDURE

Responsive proposals will be evaluated strictly in accordance with the requirements stated in this solicitation and any addenda issued. The evaluation of proposals shall be accomplished by an evaluation team, to be designated by OSPI, which will determine the ranking of the proposals.

OSPI, at its sole discretion, may elect to select the top-scoring firm(s) as finalist(s) for an oral presentation.

### 7.2. EVALUATION WEIGHTING AND SCORING

The following points will be assigned to the proposals for evaluation purposes (refer to Exhibit G for more details):

<b>Technical Requirements – 50%</b>		<b>400 points</b>
<b>Coherence/Scope Across Requirements</b>	<b>60 points (max.)</b>	
<b>Communications Strategic Plan</b>	<b>85 points (max.)</b>	
<b>Consortium Branding</b>	<b>85 points (max.)</b>	
<b>Communications Support</b>	<b>85 points (max.)</b>	
<b>Support for Reporting Systems</b>	<b>85 points (max.)</b>	
<b>Management Proposal – 25%</b>		<b>200 points</b>
<b>Exp./Qualifications of Project Mgt.</b>	<b>80 points (max.)</b>	
<b>Communications Strategic Plan</b>	<b>30 points (max.)</b>	
<b>Consortium Branding</b>	<b>30 points (max.)</b>	
<b>Communications Support</b>	<b>30 points (max.)</b>	
<b>Support for Reporting Systems</b>	<b>30 points (max.)</b>	
<b>Cost Proposal – 25%</b>		<b>200 points</b>
<b>Total</b>		<b>800 points</b>
<b>References (Finalist Proposals only)</b>	<b>40 points (max.)</b>	<b>40 points</b>
<b>GRAND TOTAL</b>		<b>840 points</b>

### **7.3. NOTIFICATION TO PROPOSERS**

Firms whose proposals have not been selected for further consideration, negotiation or award will be notified via FAX or e-mail.

### **7.4. DEBRIEFING OF UNSUCCESSFUL PROPOSERS**

Upon request, an individual debriefing conference will be scheduled with an unsuccessful PROPOSER. April 20, 2011, is the scheduled date for debriefing. PROPOSERS wishing to be debriefed must notify the RFP Coordinator via email to schedule a time. April 20 will be the only date available for debrief, unless a modification is made for the convenience of OSPI.

Discussion will be limited to a review of the requesting PROPOSER's proposal. Comparisons between proposals or evaluations of the other proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone and will be scheduled for a maximum of 30 minutes.

### **7.5. PROTEST PROCEDURE**

This procedure is available to PROPOSERS who submitted a response to this solicitation document and who have participated in a debriefing conference. Upon completing the debriefing conference, the PROPOSER is allowed three (3) business days to file a protest of the acquisition with the RFP Coordinator. Protests may be submitted by facsimile, but should be followed by the original document.

PROPOSERS protesting this procurement shall follow the procedures described below. Protests that do not follow these procedures shall not be considered. This protest procedure constitutes the sole administrative remedy available to a PROPOSER under this procurement.

All protests must be in writing and signed by the protesting party or an authorized agent. The protest must state the grounds for the protest with specific facts and complete statements of the action(s) being protested. A description of the relief or corrective action being requested should also be included. All protests shall be addressed to the RFP Coordinator.

Only protests stipulating an issue of fact concerning the following subjects shall be considered:

- A matter of bias, discrimination or conflict of interest on the part of the evaluator.
- Errors in computing the score.
- Non-compliance with procedures described in the procurement document or OSPI policy.

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, or 2) OSPI's assessment of its own and/or the CONSORTIUM's needs or requirements.

Upon receipt of a protest, a protest review will be held by OSPI. The OSPI Contracts Administrator or an employee delegated by the Contracts Administrator who was not involved in the procurement will consider the record and all available facts and issue a decision within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

In the event a protest may affect the interest of another PROPOSER that submitted a proposal, such PROPOSER will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

The final determination of the protest shall:

- Find the protest lacking in merit and uphold OSPI's action; or
- Find only technical or harmless errors in OSPI's acquisition process and determine OSPI to be in substantial compliance and reject the protest; or
- Find merit in the protest and provide OSPI options which may include:
  - Correct the errors and re-evaluate all proposals, or
  - Reissue the solicitation document and begin a new process, or
  - Make other findings and determine other courses of action as appropriate.

If OSPI determines that the protest is without merit, OSPI will enter into a contract with the Apparent Successful Contractor. If the protest is determined to have merit, one of the alternatives noted in the preceding paragraph will be taken.

## 8. SERVICE LEVEL EXPECTATIONS & REMEDIES

Timely delivery of services and deliverable is imperative and, as a result, the contract will include provisions for expectations and financial remedies to ensure the completion of tasks and processes deemed essential to the CONSORTIUM. CONTRACTOR's failure to complete essential tasks and processes both correctly and on time could result in substantial injury to the CONSORTIUM, either through incidental cost burdens from corrective actions or through jeopardizing the integrity of the CONSORTIUM through the release of inaccurate or misleading information.

The following list of expectations and the associated financial remedies dictate the terms regarding service performance expected of the CONTRACTOR while working with the CONSORTIUM. This list is not to be construed as all inclusive, but any item deemed essential after the release of the RFP will be added through addenda prior to the proposal due date or will be included through negotiation prior to execution of the contract.

Service Expectation	Metric	Remedy
Requests from External Source: CONSORTIUM leadership notified in a timely manner.	Within one (1) business day CONTRACTOR neglects to notify CONSORTIUM leadership of an external request with description of request and recommended process and timeline for resolution. Documentation will be in the form of emails date/time stamps from requestor, CONTRACTOR, and CONSORTIUM. For paper based requests, documentation will be based on date/time stamps of mail logs. If paper documents are not logged, the assumption will be that the service level was not achieved.	\$5,000 per incident
Requests from Consortium Membership: Requests responded to in a timely manner	Within one (1) business day CONTRACTOR neglects to send response to a CONSORTIUM membership requestor with description of process and anticipated timeline for resolution. Documentation will be in the form of emails date/time stamps from requestor and CONTRACTOR. For paper based requests, documentation will be based on date/time stamps of mail logs. If paper documents are not logged, the assumption will be that the service level was not achieved.	\$5,000 per incident

Requests from Consortium Leadership: Requests responded to in a timely manner	Within one (1) business day CONTRACTOR neglects to send response to requestor. Documentation will be in the form of emails date/time stamps from requestor and CONTRACTOR.	\$10,000 per incident
Monthly reports on dispensation of all requests are provided within five business days after end of the month.	Example – Monthly report on August 2011 provided by end-of-day* of fifth business day of September.	\$2,500 per incident
Participate in all CONSORTIUM meetings, whether in person, by conference call, or via WebEx format.	CONTRACTOR (primary contact and/or designee) fails to attend scheduled meeting without prior release from CONSORTIUM leadership.	\$5,000 per incident
Produce minutes of meetings: Minutes are provided end-of-day three business days after meeting adjournment.	Example – if meeting adjourns Monday at 2 pm, the minutes must be provided no later than end-of-day* Thursday. Documentation of meeting times will be contained in the agenda of the meetings. Documentation of delivery of minutes will be in the date/time stamp of email through which the minutes are attached. Minutes must be of sufficient detail to inform others of previous discussion threads and assist with decision making.	\$5,000 per incident
Draft plans, recommendations, proposals from the CONTRACTOR do not contain substantial errors or omissions.	CONTRACTOR fails to conduct thorough quality control review of materials submitted to the CONSORTIUM for review.	\$2,500 per incident
After revisions, all documents and materials are accurate and of a high quality.	CONTRACTOR neglects to conduct a thorough quality control review on own work and requested edits made by CONSORTIUM.	\$5,000 per incident

<p>All work products posted or displayed as “Final” and available for use and consumption by others are without error.</p>	<p>CONTRACTOR neglects to conduct a thorough quality control review and/or neglects to incorporate edits provided by the CONSORTIUM on postings and products for general use.</p>	<p>\$10,000 per incident</p>
<p>Unless otherwise authorized in advance, CONSORTIUM leadership is provided a minimum of three (3) complete business days response time to review and edit draft postings and products.</p>	<p>Example – Deadlines for deliverables from the CONSORTIUM are 11:59PM (Pacific). If a deadline for the CONSORTIUM to return edited materials is midnight Thursday, the draft materials must be delivered to the CONSORTIUM by 11:59PM (Pacific) Monday.</p>	<p>\$5,000 per incident</p>
<p>Initial communications plan is presented within 30 calendar days of contract execution date. Evaluation and revised plans are presented according to the schedule below:  Oct. 15, 2011  June 15, 2012  Dec. 15, 2012  June 15, 2013  Dec. 15, 2013  June 15, 2014  Sept. 15, 2014</p>	<p>CONTRACTOR neglects to provide plans to CONSORTIUM leadership per prescribed timelines. Documentation of plans delivery will be in the date/time stamp of email through which the plans are attached.</p>	<p>\$10,000 per incident</p>
<p>Invoicing to the CONSORTIUM will occur on a monthly basis, and will accurately reflect products and services delivered prior to invoicing.</p>	<p>CONTRACTOR falls more than 30 days behind in monthly invoices;  -or-  CONSORTIUM is invoiced for products or services not delivered;  -or-  CONSORTIUM is invoiced for products or services that have already been paid for.</p>	<p>\$1,000 per incident</p>

<p>After 5 business days of a request, CONTRACTOR will provide further detail on expenses or invoiced items that have been reported or are anticipated.</p>	<p>Example – if a request for detail is made on a Wednesday, the information must be provided no later than end-of-day* the following Wednesday.</p>	<p>\$2,500 per incident</p>
<p>Quarterly financial status report of actual and anticipated cost breakdowns is provided within ten (10) business days of conclusion of previous quarter.</p>	<p>Example – April 1 through June 30, 2011 report is due by end-of-day* of the tenth business day of July 2011. Report will display actual and anticipated expenditures by quarter for the life of the contract.</p>	<p>\$5,000 per incident</p>

(\* ) The CONSORTIUM definition of “end-of-day” is 11:59PM in the sender’s time zone.

**Collection of Remedy**

At OSPI’s discretion, collection of financial remedies may be initiated through either deduction from contract payments or direct invoicing to the CONTRACTOR.

**9. RFP EXHIBITS**

- Exhibit A Race To The Top Notice Inviting Applications – Comprehensive Assessment Program
- Exhibit B Common Core Standards
- Exhibit C Staffing & Responsibilities Table
- Exhibit D Budget Submission Form
- Exhibit E Personal Service Contract Format including General Terms and Conditions (GT&Cs)
- Exhibit F Certifications and Assurances
- Exhibit G Evaluation Criteria

EXHIBIT A

**Race to the Top Assessment Program  
Comprehensive Assessment Systems**

Notice Inviting Applications

<http://www2.ed.gov/programs/racetothetop-assessment/index.html>

(Go to bullet for Comprehensive Assessment System grant and open the linked document)

EXHIBIT B

**Common Core State Standards**

ELA Standards: [http://www.corestandards.org/assets/CCSSI\\_ELA%20Standards.pdf](http://www.corestandards.org/assets/CCSSI_ELA%20Standards.pdf)

Mathematics Standards: [http://www.corestandards.org/assets/CCSSI\\_Math%20Standards.pdf](http://www.corestandards.org/assets/CCSSI_Math%20Standards.pdf)



Budget - Accounting Category

Salaries & Wages	
Benefits	
Travel	
- staff	
- client	
- consultant	
Communications	
- telephone	
- email	
- file transfers	
- teleconferencing	
Software Development	
- test generation	
- test processing	
- data analysis	
- report preparation	
Consultant Contracts	
Facilities & Equipment	
Materials	
Teacher Training Expenses	
Other (Itemized list)	
Overhead	
Taxes	

GRAND TOTAL

EXHIBIT E  
**CONTRACT FOR PERSONAL SERVICES**  
Contract No. \_\_\_\_\_

between

**SUPERINTENDENT OF PUBLIC INSTRUCTION,  
STATE OF WASHINGTON**  
(hereinafter referred to as Superintendent)  
Old Capitol Building, P. O. Box 47200  
Olympia, WA 98504-7200

and

**NAME OF CONTRACTOR**  
(hereinafter referred to as Contractor)  
Address of Contractor

**Social Security # or Federal Identification #**  
and  
**Unified Business Identifier #**

In consideration of the promises and conditions contained herein, Superintendent and Contractor do mutually agree as follows:

**I. DUTIES OF THE CONTRACTOR**

**A. The general objective(s) of this contract are as follows:**

*(Enter a brief description of the agreed upon services here)*

**B. In order to accomplish the general objective(s) of this contract, Contractor shall perform the following specific duties to the satisfaction of the Superintendent's designee, \_\_\_\_\_:**

(Describe the work to be performed by Contractor in detail, including a breakdown of the quantifiable steps or components of what Contractor is to do)

**II. CONDITIONS OF COMMENCEMENT OF PERFORMANCE AND SCHEDULE OF PERFORMANCE**

Contractor shall not commence performance, or be entitled to compensation or reimbursement for any services rendered, prior to the occurrence of each of the following conditions: (1) This contract must be executed by a representative of the Contractor and the Superintendent; (2) This contract must be filed with, and approved by, the Office of Financial Management, if and to the extent required by state personal service contract laws; and, (3) Superintendent's designee must confirm the occurrence of conditions number one and two and notify the Contractor to commence performance.

The schedule of performance of Contractor's duties is as follows subject, however, to the three prior conditions to commencement of performance set forth immediately above.

### III. DUTIES OF THE SUPERINTENDENT

- A. In consideration of Contractor's satisfactory performance of the duties set forth herein, Superintendent shall compensate Contractor > at an hourly rate of \$> not to exceed a total of > dollars (\$>) OR > not to exceed a total of > dollars (\$>) as noted below in part B, Schedule of Payments OR > in an amount equal to Contractor's actual cost, plus overhead or indirect costs at a rate of > percent of actual costs not to exceed a total of > dollars (\$>) as per Attachment B, Budget, attached hereto and incorporated by this reference.

>Funds for the payment of this contract are provided by federal program(s) \_\_\_\_\_, CFDA #(s) \_\_\_\_\_.

**B. Payment shall be made to the Contractor as follows:**

>Periodically in the form of progress payments in the amounts and for the stages of partial performance set forth below:

Schedule of Payments

>Periodically based on invoices submitted by the Contractor for actual costs incurred to date based on receipts or other documentation.

**C. Contractor shall be entitled to reimbursement for expenses incurred, as follows:**

1. Travel and per diem expenses for > person(s) in the amounts and for the purposes otherwise established for state employees at the time of incurrence by the rules and regulatory policies of the Office of Financial Management (OFM) not to exceed > dollars (\$>). Contractor's "official duty station" (i.e., the origin of reimbursable travel and/or per diem) shall be > and /or,
2. Expenses incurred for the following specified purposes not to exceed a total of > dollars (\$>). Contractor must submit receipts or other documentation.

### IV. RENEWAL (OPTIONAL CLAUSE)

OSPI has the right to renew this contract in whole or in part for the year(s)\_\_\_\_\_ by giving notice on or before \_\_\_\_\_ to the Contractor. If OSPI provides such notice to the Contractor, the Contractor shall be obligated to enter into a contract with the same fiscal obligations as the previous contract year, provided that Superintendent and Contractor shall negotiate any revision of additional services or goals beyond those encompassed in the previous contract.

### V. INCORPORATION OF ATTACHMENTS AND ORDER OF PRECEDENCE

Each of the Attachments listed below is by this reference hereby incorporated into this contract. In the event of an inconsistency in this contract, the inconsistency shall be resolved by giving precedence in the following order:

- Applicable Federal and state of Washington statutes and regulations
- Special Terms and Conditions as contained in this basic contract instrument
- Attachment A – Contract for Personal Services, General Terms and Conditions
- *Attachment B – Request for Proposals No. \_\_\_\_\_*
- *Attachment C – Contractor's Proposal*
- *Any other provision, term or material incorporated herein by reference or otherwise*

incorporated.

**VI. APPROVAL**

This contract shall be subject to the written approval of the Superintendent's authorized representative and shall not be binding until so approved. The contract may be altered, amended, or waived only by a written amendment executed by both parties.

We the undersigned agree to the terms of the foregoing contract.

[CONTRACTOR Name]

Superintendent of Public Instruction  
State of Washington

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Sheryl Turner, Contracts Administrator

\_\_\_\_\_  
Title Date

\_\_\_\_\_  
Date

**Who certifies that he/she is the Contractor identified herein, OR a person duly qualified and authorized to bind the Contractor so identified to the foregoing Agreement.**

Approved as to FORM ONLY

**Non-profit organization?**  yes\*  no

\_\_\_\_\_  
Assistant Attorney General

\_\_\_\_\_  
**\*If yes, under what IRS section?**

\_\_\_\_\_  
Date

## Exhibit E

### **Attachment A Contract for Personal Services GENERAL TERMS AND CONDITIONS**

1. **Access to Data.** In compliance with Chapter 39.29 RCW, the Contractor shall provide access to data generated under this contract to the Superintendent, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the Contractor's reports, including computer models and methodology for those models.
2. **Alterations and Amendments.** This agreement may be amended only by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.
3. **Americans with Disabilities Act (ADA) of 1990, Public Law 101-336, also referred to as the "ADA" 28 CFR Part 35.** The Contractor must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.
4. **Assignment.** Neither this Contract, nor any claim arising under this Contract, shall be transferred or assigned by the Contractor without prior written consent of the Superintendent.
5. **Assurances.** The Superintendent and the Contractor agree that all activity pursuant to this Contract will be in accordance with all applicable current federal, state and local laws, rules and regulations.
6. **Attorney's Fees.** In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney's fees and costs.
7. **Budget Revisions.** Any monetary amount budgeted by the terms of this contract for various activities and line item objects of expenditure may be revised without prior written approval of Superintendent, so long as the revision is no more than ten percent (10%) of the original line item amount and the increase in an amount is offset by a decrease in one or more other amounts equal to or greater than the increase. All other budget revisions exceeding ten percent (10%) shall only be made with the prior written approval of the Superintendent.
8. **Certification Regarding Debarment, Suspension, and Ineligibility.** If federal funds are the basis for this contract, the Contractor certifies that neither it nor its principals are debarred, suspended, proposed for debarment, or voluntarily excluded from participation in transactions by any federal department or agency. The Contractor further certifies that they will ensure that potential sub-contractors or any of their principals are not debarred, suspended, proposed for debarment, or voluntarily excluded from participation in "covered transactions" by any federal department or agency. "Covered transactions" include procurement contracts for goods that are expected to equal or exceed \$25,000. Contractor may do so by obtaining a certification statement from the potential sub-contractor or subrecipient or by checking the "List of Parties Excluded from Federal Procurement and Non-Procurement Programs" provided on-line by the General Services Administration.
9. **Change in Status.** In the event of substantive change in the legal status, organizational structure, or fiscal reporting responsibility of the Contractor, Contractor agrees to notify the Superintendent of the change. Contractor shall provide notice as soon as practicable, but no later than thirty (30) days after such a change takes effect.
10. **Confidentiality.** The Contractor acknowledges that all of the data, material and information which originates from this contract, and the student assessment data, material and information which will come into its possession in connection with performance under this contract, consists of confidential data owned by the Superintendent or confidential personally identifiable data subject to the federal Family Educational Rights and Privacy Act or other privacy laws, and that disclosure to or use by third parties

would be damaging. The Contractor, therefore, agrees to hold all such material and information in strictest confidence, not to make use thereof other than for the performance of this contract, to release it only to authorized employees and agents requiring such information and not release or disclose it to any other party. The Contractor agrees to release such information or material only to employees and agents who have signed a written agreement expressly prohibiting disclosure.

11. Copyright Provisions. Unless otherwise provided, all Materials produced under this contract shall be considered "works for hire" as defined by the U.S. Copyright Act and shall be owned by the Superintendent. The Superintendent shall be considered the author of such Materials. If Materials are not considered "works for hire", Contractor hereby irrevocably assigns all right, title, and interest in Materials, including all intellectual property rights, to the Agency effective from the moment of creation of such Materials.

Materials means all items in any format and includes, but is not limited to, data, reports, documents, pamphlets, advertisements, books, magazines, surveys, studies, computer programs, films, tapes, and/or sound reproductions. Ownership includes the right to copyright, patent, register and the ability to transfer these rights.

For Materials that are delivered under the contract, but that incorporate pre-existing materials not produced under the contract Contractor hereby grants to the Agency a nonexclusive, royalty-free, irrevocable license (with rights to sublicense others) in such Materials to translate, reproduce, distribute, prepare derivative works, publicly perform, and publicly display. The Contractor warrants and represents that Contractor has all rights and permissions, including intellectual property rights, moral rights and rights of publicity, necessary to grant such a license to the Agency.

The Contractor shall exert all reasonable effort to advise the Agency, at the time of delivery of data furnished under this contract, of all known or potential invasions of privacy contained therein and of any portion of such document which was not produced in the performance of this contract. The Agency shall receive prompt written notice of each notice or claim of infringement received by the Contractor with respect to any data delivered under this contract. The Agency shall have the right to modify or remove any restrictive markings placed upon the data by the Contractor.

12. Covenant Against Contingent Fees. The Contractor warrants that no person or selling agent has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, excepting bona fide employees or bona fide established agent maintained by the Contractor for the purpose of securing business. The Agency shall have the right, in the event of breach of this clause by the Contractor, to annul this contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fees.
13. Disputes. In the event that a dispute arises under this contract, it shall be determined by a Dispute Board in the following manner: (1) The Superintendent shall appoint a member to the Dispute Board; (2) the Contractor shall appoint a member to the Dispute Board; (3) the Superintendent and the Contractor shall jointly appoint a member to the Dispute Board; (4) the Dispute Board shall evaluate the dispute and make a determination of the dispute; and, the determination of the Dispute Board shall be final and binding on the parties hereto.

As alternatives to the above Dispute Board process: (1) if the dispute is between two or more state agencies, any one of the agencies may request intervention by the Governor, as provided by 43.17.330 RCW, in which event the Governor's process shall control; and, (2) if the dispute is between a non-state agency and another state agency or non-state agency party to this contract, all the disputing parties may mutually agree to mediation prior to submitting the dispute to a Dispute Board in the event the dispute is not resolved pursuant to mediation within an agreed-upon time period.

14. Duplicate Payment. The Superintendent shall not pay the Contractor, if the Contractor has charged or will charge the state or Washington or any other party under any other contract or agreement, for the same services or expenses.

15. Entire Agreement. This contract contains all the terms and conditions agreed upon by the parties. No other understandings, oral or otherwise, regarding the subject matter of this Agreement shall be deemed to exist or to bind any of the parties hereto.
16. Ethical Conduct. Neither the Contractor nor any employee or agent of the Contractor shall participate in the performance of any duty or service in whole or part under this contract in violation of, or in a manner that violates any provision of the Ethics in Public Service law at Chapter 42.52 RCW, RCW 42.17.130 and 41.06.250 prohibiting the use of public resources for political purposes.
17. Governing Law. This contract shall be construed and interpreted in accordance with the laws of the State of Washington and the venue of any action brought hereunder shall be in Superior Court for Thurston County.
18. Indemnification. To the fullest extent permitted by law, Contractor shall indemnify, defend and hold harmless the Superintendent and all officials, agents, and employees of the Superintendent, from and against all claims for injuries or death arising out of or resulting from the performance of this contract. "Claim" as used in this contract, means any financial loss, claim, suit, action, damage, or expense, including but not limited to attorney's fees, attributable for bodily injury, sickness, disease, or death, or injury to or destruction of tangible property including loss of use resulting therefrom. Additionally, "claims" shall include but not be limited to, assertions that the use or transfer of any software, book, document, report, film, tape or sound reproduction or material of any kind, delivered hereunder, constitutes an infringement of any copyright, patent, trademark, trade name, or otherwise results in an unfair trade practice or in unlawful restraint of competition. Contractor's obligation to indemnify, defend and hold harmless includes any claim by Contractor's agents, employees, representatives, or any sub-contractor or its employees.

Contractor expressly agrees to indemnify, defend, and hold harmless the Superintendent for any claim out of or incident to Contractor's or sub-contractor's performance or failure to perform the contract. Contractor's obligation to indemnify, defend, or hold harmless the Superintendent shall not be eliminated or reduced by any actual or alleged concurrent negligence by Superintendent or its agents, employees, or officials.

Contractor waives its immunity under Title 51 RCW to the extent it is required to indemnify, defend and hold harmless Superintendent and its agents, employees, or officials.

19. Independent Capacity of the Contractor. The parties intend that an independent Contractor relationship will be created by this contract. The Contractor and his/her employees or agents performing under this contract are not employees or agents of the Superintendent. The Contractor will not hold himself/herself out as nor claim to be an officer or employee of the Superintendent or of the state of Washington by reason hereof, nor will the Contractor make any claim or right, privilege, or benefit which would accrue to such employee under law. Conduct and control of the work will be solely with the Contractor.
20. Insurance.
  - a. Worker's Compensation Coverage. The Contractor shall at all times comply with all applicable worker's compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the fullest extent applicable. This requirement includes the purchase of industrial insurance coverage for the Contractor's employees, as may now hereafter be required of an "employer" as defined in Title 51 RCW. Such worker's compensation and occupational disease requirements shall include coverage for all employees of the Contractor, and for all employees of any subcontract retained by the Contractor, suffering bodily injury (including death) by accident or disease, which arises out of or in connection with the performance of this contract. Satisfaction of these requirements shall include, but shall not be limited to:
    - 1) Full participation in any required governmental occupational injury and/or disease insurance program, to the extent participation in such a program is mandatory in any

jurisdiction;

- 2) Purchase worker's compensation and occupational disease insurance benefits to employees in full compliance with all applicable laws, statutes, and regulations, but only to the extent such coverage is not provided under mandatory governmental program in "a" above, and/or;
- 3) Maintenance of a legally permitted and governmentally approved program of self-insurance for worker's compensation and occupational disease.

Except to the extent prohibited by law, the program of the Contractor's compliance with worker's compensation and occupational disease laws, statutes, and regulations in 1), 2), and 3) above shall provide for a full waiver of rights of subrogation against the Superintendent, its directors, officers, and employees.

If the Contractor, or any sub-contractor retained by the Contractor, fails to effect and maintain a program of compliance with applicable worker's compensation and occupational disease laws, statutes, and regulations and the Superintendent incurs fines or is required by law to provide benefits to such employees, to obtain coverage for such employees, the Contractor will indemnify the Superintendent for such fines, payment of benefits to Contractor or sub-contractor employees or their heirs or legal representatives, and/or the cost of effecting coverage on behalf of such employees. Any amount owed the Superintendent by the Contractor pursuant to the indemnity may be deducted from any payments owed by the Superintendent to the Contractor for the performance of this contract.

- b. *(Optional Provision)* Automobile Insurance. In the event that services delivered pursuant to this contract involve the use of vehicles, owned or operated by the Contractor, automobile liability insurance shall be required. The minimum limit for automobile liability is:

\$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.

- c. *(Optional Provision)* Business Automobile Insurance. In the event that services performed under this contract involve the use of vehicles or the transportation of clients, automobile liability insurance shall be required. If Contractor-owned personal vehicles are used, a Business Automobile policy covering a minimum Code 2 "owned autos only" must be secured. If the Contractor's employees' vehicles are used, the Contractor must also include under the Business Automobile policy Code 9, coverage for "non-owned autos." The minimum limits for automobile liability is:

\$1,000,000 per occurrence, using a Combined Single Limit for bodily injury and property damage.

- d. *(Optional Provision)* Public Liability Insurance. The Contractor shall at all times during the term of this contract, at its cost and expense, carry and maintain general public liability insurance, including contractual liability, against claims for bodily injury, personal injury, death, or property damage occurring or arising out of services provided under this contract. This insurance shall cover such claims as may be caused by any act, omission, or negligence of the Contractor or its officers, agents, representatives, assigns or servants. The limits of liability insurance, which may be increased from time to time as deemed necessary by the Superintendent, with the approval of the Contractor (which shall not be unreasonably withheld), shall not be less than as follows:

Each Occurrence	\$1,000,000
General Aggregate Limits (other than products-completed operations)	\$2,000,000
Products-Completed Operations Limit	\$2,000,000
Personal and Advertising Injury Limit	\$1,000,000

Fire Damage Limit (any one fire)	\$50,000
Medical Expense Limit (any one person)	\$50,000

- e. *(Optional Provision)* Additional Insured. The State of Washington and the Superintendent shall be specifically named as an additional insured on all policies, and all policies shall be primary to any other valid and collectible insurance. At its option, the Superintendent may waive this requirement where insurance carriers will not under any circumstances extend secondary insurance coverage for physicians' professional liability, or Architects' and Engineers' insurance. The Superintendent may also waive this requirement where insurance carriers will not under any circumstances extend secondary fidelity bonding coverage for private non-profit organizations.
- f. Proof of Insurance. Certificates and or evidence satisfactory to the Superintendent confirming the existence, terms and conditions of all insurance required above shall be delivered to the Superintendent within five (5) days of the Contractor's receipt of Authorization to Proceed.
- g. General Insurance Requirements. Contractor shall, at all times during the term of the contract and at its cost and expense, buy and maintain insurance of the types and amounts listed above. Failure to buy and maintain the required insurance may result in the termination of the contract at the Superintendent's option. By requiring insurance herein, Superintendent does not represent that coverage and limits will be adequate to protect Contractor and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the Superintendent in this contract.

Contractor shall include all sub-contractors as insureds under all required insurance policies, or shall furnish proof of insurance and endorsements for each sub-contractor. Sub-contractor(s) must comply fully with all insurance requirements stated herein. Failure of sub-contractor(s) to comply with insurance requirements does not limit Contractor's liability or responsibility.

- 21. Licensing and Accreditation Standards. The Contractor shall comply with all applicable local, state, and federal licensing, accreditation and registration requirements/standards, necessary to the performance of this contract.
- 22. Limitation of Authority. Only the Superintendent of the Superintendent's delegate by writing (delegation to be made prior to action) shall have the express, implied, or apparent authority to alter, amend, modify, or waive any clause or condition of this contract. Furthermore, any alteration, amendment, modification, or waiver or any clause or condition of this contract is not effective or binding unless made in writing and signed by the Superintendent.
- 23. Non-Discrimination. The Contractor shall comply with all the federal and state non-discrimination laws, regulations and policies, which are otherwise applicable to the Superintendent. Accordingly, no person shall, on the ground of race, creed, color, national origin, sex, marital status, sexual orientation, age, or the presence of any sensory, mental, or physical disability, be unlawfully excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any activity performed by the Contractor and its agents under this contract. The Contractor shall notify the Superintendent immediately of any allegations, claims, disputes, or challenges made against it under the Americans with Disabilities Act. In the event of the Contractor's noncompliance or refusal to comply with this nondiscrimination provision, this contract may be rescinded, cancelled or terminated in whole or part, and the Contractor may be declared ineligible for further contracts with the Superintendent.
- 24. Overpayments. Contractor shall refund to Superintendent the full amount of any overpayment under this contract within thirty (30) calendar days of written notice. If Contractor fails to make a prompt refund, Superintendent may charge Contractor one percent (1%) per month on the amount due until paid in full.
- 25. Payments. No payments in advance or in anticipation of services or supplies to be provided under this contract shall be made by the Superintendent. All payments to the Contractor are conditioned upon (1) Contractor's submission of a properly executed and supported voucher for payment, including such

supporting documentation of performance and supporting documentation of costs incurred or paid, or both as is otherwise provided for in the body of this contract under Duties of the Superintendent, and (2) Acceptance and certification by the Superintendent or designee of satisfactory performance by the Contractor.

Except as otherwise provided in this contract, (1) All approvable vouchers for payment due to the Contractor shall be paid within thirty (30) calendar days of their submission by the Contractor, and (2) All expenses necessary to the Contractor's performance of this contract not specifically mentioned in the contract shall be borne in full by the Contractor.

26. Public Disclosure. Contractor acknowledges that the Agency is subject to Chapter 42.56 RCW, the Public Disclosure Act and that this contract shall be a public record as defined in RCW 42.56. Any specific information that is claimed by the Contractor to be confidential or proprietary must be clearly identified as such by the Contractor. To the extent consistent with chapter 42.56 RCW, the Agency shall maintain the confidentiality of all such information marked confidential or proprietary. If a request is made to view the Contractor's information, the Agency will notify the Contractor of the request and the date that such records will be released to the requester unless Contractor obtains a court order enjoining that disclosure. If the Contractor fails to obtain the court order enjoining disclosure, the Agency will release the requested information on the date specified.
27. Publicity. The Contractor agrees to submit to the Agency all advertising and publicity matters relating to this Contract which in the Agency's judgment, Agency's name can be implied or is specifically mentioned. The Contractor agrees not to publish or use such advertising and publicity matters without the prior written consent of the Agency.
28. Registration with Department of Revenue. The Contractor shall complete registration with the Department of Revenue and be responsible for payment of all taxes due on payments made under this contract.
29. Records Maintenance. The Contractor shall maintain all books, records, documents, data and other evidence relating to this contract and performance of the services described herein, including but not limited to accounting procedures and practices which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this Contract. Contractor shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the contract, shall be subject at all reasonable times to inspection, review or audit by the Agency, personnel duly authorized by the Agency, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement

If any litigation, claim or audit is started before the expiration of the six (6) year period, the records shall be retained until all litigation, claims, or audit findings involving the records have been resolved.

30. Right of Inspection. The Contractor shall provide right of access to its facilities to the Superintendent or any of its officers at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this contract on behalf of the Superintendent. All inspections and evaluations shall be performed in such a manner that will not unduly interfere with the Contractor's business or work hereunder.
31. Severability. The provisions of this contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the contract.
32. Site Security. While on Agency premises, Contractor, its agents, employees, or sub-contractors shall conform in all respects with physical, fire or other security policies or regulations.
33. Subcontracting. Neither the Contractor nor any sub-contractor shall enter into subcontracts for any of the work contemplated under this contract without obtaining prior written approval of the Superintendent. In no event shall the existence of the subcontract operate to release or reduce liability of the Contractor to the Superintendent for any breach in the performance of the Contractor's duties.

This clause does not include contracts of employment between the Contractor and personnel assigned to work under this contract.

34. Taxes. All payments accrued on account of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the Contractor or its staff shall be the sole responsibility of the Contractor.
35. Termination for Convenience. Except as otherwise provided in this contract, the Superintendent or Superintendent's Designee may, by ten (10) days written notice, beginning on the second day after the mailing, terminate this contract in whole or in part. The notice shall specify the date of termination and shall be conclusively deemed to have been delivered to and received by the Contractor as of midnight the second day of mailing in the absence of proof of actual delivery to and receipt by the Contractor. If this contract is so terminated, the Superintendent shall be liable only for payment required under the terms of the contract for services rendered or goods delivered prior to the effective date of termination.
36. Termination for Default. In the event the Superintendent determines the Contractor has failed to comply with the conditions of this Contract in a timely manner, the Superintendent has the right to suspend or terminate this Contract. The Superintendent shall notify the Contractor in writing of the need to take corrective action. If corrective action is not taken within 30 days, the Contract may be terminated. The Superintendent reserves the right to suspend all or part of the Contract, withhold further payments, or prohibit the Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the Contractor or a decision by the Superintendent to terminate the Contract. In the event of termination, the Contractor shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original contract and the replacement or cover contract and all administrative costs directly related to the replacement contract, e.g., cost of the competitive bidding, mailing, advertising and staff time. The termination shall be deemed to be a "Termination for Convenience" if it is determined that the Contractor: (1) was not in default; or (2) failure to perform was outside of his or her control, fault or negligence. The rights and remedies of the Superintendent provided in this Contract are not exclusive and are in addition to any other rights and remedies provided by law
37. Termination Due to Funding Limitations. In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this contract and prior to normal completion, the Superintendent may, without advance notice and without liability for damages, terminate the contract under the "Termination for Convenience" clause. The Superintendent and Contractor may, however, renegotiate this contract under any such new funding limitations and conditions.
38. Termination Procedure. Upon termination of this contract the Superintendent, in addition to other rights provided in this contract, may require the Contractor to deliver to the Superintendent any property specifically produced or acquired for the performance of such part of this agreement as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.

The Superintendent shall pay to the Contractor the agreed upon price, if separately stated, for completed work and services accepted by the Superintendent and the amount agreed upon by the Contractor and the Superintendent for (a) completed work and services for which no separate price is stated, (b) partially completed work and services, (c) other property or services which are accepted by the Superintendent, and (d) the protection and preservation of the property, unless the termination is for default, in which case the Superintendent shall determine the extent of the liability. Failure to agree with such determination shall be a dispute within the meaning of the "Disputes" clause for this contract. The Superintendent may withhold from any amounts due to the Contractor such sum as the Superintendent determines to be necessary to protect the Superintendent against potential loss or liability.

The rights and remedies of the Superintendent provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law under this contract.

After receipt of a notice of termination, and except as otherwise directed by the Superintendent, the Contractor shall:

1. Stop work under this contract on the date and to the extent specified, in the notice;
  2. Place no further orders or sub-contractors for materials, services or facilities except as may be necessary for completion of such portion of the work under the contract that is not terminated;
  3. Assign to the Superintendent, in the manner, at the times, and to the extent directed by the Superintendent, all rights, title, and interest of the Contractor under the orders and subcontracts in which case the Superintendent has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts;
  4. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the Superintendent to the extent the Superintendent may require, which approval or ratification shall be final for all the purposes of this clause;
  5. Transfer title to the Superintendent and deliver, in the manner, at the times and to the extent as directed by the Superintendent, any property which, if the contract had been completed, would have been required to be furnished to the Superintendent;
  6. Complete performance of such part of the work not terminated by the Superintendent; and
  7. Take such action as may be necessary, or as the Superintendent may direct, for the protection and preservation of the property related to this agreement which, in is in the possession of the Contractor and in which the Superintendent has or may acquire an interest.
39. Treatment of Assets. Except as otherwise provided for in the contract, the ownership and title to all real property and all personal property purchased by the Contractor in the course of performing this contract with moneys paid by the Superintendent shall vest in the Superintendent, except for supplies consumed in performing this contract. The Contractor shall (1) maintain a current inventory of all the real and personal property; (2) label all the property "State of Washington, Superintendent of Public Instruction"; and, (3) surrender property and title to the Superintendent without charge prior to settlement upon completion, termination or cancellation of this agreement.

Any property of the Superintendent furnished to the Contractor shall, unless otherwise provided herein, or approved by the Superintendent, be used only for the performance of the contract.

The Contractor shall be responsible for any loss or damage to property of the Superintendent which results from the negligence of the Contractor which results from the failure on the part of the Contractor to maintain and administer that property in accordance with sound management practices.

If any property is lost, destroyed, or damaged, the Contractor shall notify the Superintendent and take all reasonable steps to protect the property from further damage.

All reference to the Contractor under this clause shall include Contractor's employees, agents and sub-contractors.

EXHIBIT F  
CERTIFICATION AND ASSURANCES

I/we make the following certifications and assurances as a required element of the proposal to which it is attached, understanding that the truthfulness of the facts affirmed here and the continuing compliance with these requirements are conditions precedent to the award or continuation of the related contract(s):

1. I/we declare that all answers and statements made in the proposal are true and correct.
2. The prices and/or cost data have been determined independently, without consultation, communication, or agreement with others for the purpose of restricting competition. However, I/we may freely join with other persons or organizations for the purpose of presenting a single proposal.
3. The attached proposal is a firm offer for a period of 60 days following receipt, and it may be accepted by OSPI without further negotiation (except where obviously required by lack of certainty in key terms) at any time within the 60-day period.
4. In preparing this proposal, I/we have not been assisted by any current or former employee of the state of Washington whose duties relate (or did relate) to this proposal or prospective contract, and who was assisting in other than his or her official, public capacity. (Any exceptions to these assurances are described in full detail on a separate page and attached to this document.)
5. I/we understand that OSPI will not reimburse me/us for any costs incurred in the preparation of this proposal. All proposals become the property of OSPI, and I/we claim no proprietary right to the ideas, writings, items, or samples, unless so stated in this proposal.
6. Unless otherwise required by law, the prices and/or cost data which have been submitted have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by him/her prior to opening, directly or indirectly to any other Proposer or to any competitor.
7. I/we agree that submission of the attached proposal constitutes acceptance of the solicitation contents and the attached sample contract and general terms and conditions. If there are any exceptions to these terms, I/we have described those exceptions in detail on a page attached to this document.
8. No attempt has been made or will be made by the Proposer to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.
9. I/we grant OSPI the right to contact references and others, who may have pertinent information regarding the Proposer's prior experience and ability to perform the services contemplated in this procurement.

*On behalf of the firm submitting this proposal, my name below attests to the accuracy of the above statements.*

\_\_\_\_\_  
Signature of Proposer

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

EXHIBIT G

**RFP Evaluation Criteria and Rating System**

Rate each of the following criteria as follows: **E** – demonstrates excellent evidence of criterion; **G** – demonstrates good evidence of criterion; **A** – demonstrates adequate evidence of criterion; **M** – demonstrates minimal evidence of criterion; **N** demonstrates no evidence of criterion; **NA** – not applicable. The number of points associated with each rating is given beside the criterion.

Technical Requirements (400 Points)						
<i>Criteria</i>	E	G	A	M	N	NA
<b>2.0 COHERENCE AND SCOPE ACROSS REQUIREMENTS (60 pts)</b>						
Across all requirements, the proposal presents a coherent and comprehensive approach that integrates well across the four Technical Requirements	20	15	10	5	0	
Across all requirements, the proposal is reasonably scoped and has a high likelihood of success	20	15	10	5	0	
Across all requirements, the proposal addresses the needs of the Consortium’s multiple stakeholders	20	15	10	5	0	

Technical Requirements (continued)						
<b>2.1 COMMUNICATIONS STRATEGIC PLAN (85 pts)</b>	<b>E</b>	<b>G</b>	<b>A</b>	<b>M</b>	<b>N</b>	<b>NA</b>
<b>A. Project Approach/Methodology</b>						
Proposal demonstrates clear understanding of the work necessary to implement this requirement	5	4	3	2	0	
The approach and overall design is clearly described and easily understood, including descriptions of tasks and how they will be accomplished	5	4	3	2	0	
<b>B. Work Plan</b>						
The proposed work plan is complete and addresses the scope of the project	5	4	3	2	0	
Level of detail proposed in the project work plan is appropriate for the project needs	5	4	3	2	0	
The implementation of the plan is likely to succeed	5	4	3	2	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	5	4	3	2	0	
<b>C. Project Schedule</b>						
The schedule includes activities of a reasonable scope and key milestone dates	5	4	3	2	0	
Deliverables are accurately identified and scheduled to be provided in time to meet Consortium needs	5	4	3	2	0	
Major dependencies within the schedule have been identified	5	4	3	2	0	
<b>D. Deliverables</b>						
Deliverables are identified and clearly described	5	4	3	2	0	
Deliverables will need the Consortium's needs	5	4	3	2	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	5	4	3	2	0	
<b>E. Outcomes and Performance Measurement</b>						
Overall work plan is well designed to achieve the stated outcomes	5	4	3	2	0	
Description to monitor/measure outcomes is thorough	5	4	3	2	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to Consortium leadership	5	4	3	2	0	
<b>F. Risks</b>						
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	5	4	3	2	0	

Technical Requirements (continued)						
<b>2.2 CONSORTIUM BRANDING (85 pts)</b>	<b>E</b>	<b>G</b>	<b>A</b>	<b>M</b>	<b>N</b>	<b>NA</b>
<b>A. Project Approach/Methodology</b>						
Proposal demonstrates clear understanding of the work necessary to implement this requirement	5	4	3	2	0	
The approach and overall design is clearly described and easily understood, including descriptions of tasks and how they will be accomplished	5	4	3	2	0	
<b>B. Work Plan</b>						
The proposed work plan is complete and addresses the scope of the project	5	4	3	2	0	
Level of detail proposed in the project work plan is appropriate for the project needs	5	4	3	2	0	
The implementation of the plan is likely to succeed	5	4	3	2	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	5	4	3	2	0	
<b>C. Project Schedule</b>						
The schedule includes activities of a reasonable scope and key milestone dates	5	4	3	2	0	
Deliverables are accurately identified and scheduled to be provided in time to meet Consortium needs	5	4	3	2	0	
Major dependencies within the schedule have been identified	5	4	3	2	0	
<b>D. Deliverables</b>						
Deliverables are identified and clearly described	5	4	3	2	0	
Deliverables will need the Consortium's needs	5	4	3	2	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	5	4	3	2	0	
<b>E. Outcomes and Performance Measurement</b>						
Overall work plan is well designed to achieve the stated outcomes	5	4	3	2	0	
Description to monitor/measure outcomes is thorough	5	4	3	2	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to Consortium leadership	5	4	3	2	0	
<b>F. Risks</b>						
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	5	4	3	2	0	

Technical Requirements (continued)						
<b>2.3 COMMUNICATIONS SUPPORT (85 pts)</b>	<b>E</b>	<b>G</b>	<b>A</b>	<b>M</b>	<b>N</b>	<b>NA</b>
<b>A. Project Approach/Methodology</b>						
Proposal demonstrates clear understanding of the work necessary to implement this requirement	5	4	3	2	0	
The approach and overall design is clearly described and easily understood, including descriptions of tasks and how they will be accomplished	5	4	3	2	0	
<b>B. Work Plan</b>						
The proposed work plan is complete and addresses the scope of the project	5	4	3	2	0	
Level of detail proposed in the project work plan is appropriate for the project needs	5	4	3	2	0	
The implementation of the plan is likely to succeed	5	4	3	2	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	5	4	3	2	0	
<b>C. Project Schedule</b>						
The schedule includes activities of a reasonable scope and key milestone dates	5	4	3	2	0	
Deliverables are accurately identified and scheduled to be provided in time to meet Consortium needs	5	4	3	2	0	
Major dependencies within the schedule have been identified	5	4	3	2	0	
<b>D. Deliverables</b>						
Deliverables are identified and clearly described	5	4	3	2	0	
Deliverables will need the Consortium's needs	5	4	3	2	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	5	4	3	2	0	
<b>E. Outcomes and Performance Measurement</b>						
Overall work plan is well designed to achieve the stated outcomes	5	4	3	2	0	
Description to monitor/measure outcomes is thorough	5	4	3	2	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to Consortium leadership	5	4	3	2	0	
<b>F. Risks</b>						
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	5	4	3	2	0	

Technical Requirements (continued)						
<b>2.4 SUPPORT FOR REPORTING SYSTEMS (85 pts)</b>	<b>E</b>	<b>G</b>	<b>A</b>	<b>M</b>	<b>N</b>	<b>NA</b>
<b>A. Project Approach/Methodology</b>						
Proposal demonstrates clear understanding of the work necessary to implement this requirement	5	4	3	2	0	
The approach and overall design is clearly described and easily understood, including descriptions of tasks and how they will be accomplished	5	4	3	2	0	
<b>B. Work Plan</b>						
The proposed work plan is complete and addresses the scope of the project	5	4	3	2	0	
Level of detail proposed in the project work plan is appropriate for the project needs	5	4	3	2	0	
The implementation of the plan is likely to succeed	5	4	3	2	0	
The proposal includes a creative approach that is reasonable and that is worthy of consideration	5	4	3	2	0	
<b>C. Project Schedule</b>						
The schedule includes activities of a reasonable scope and key milestone dates	5	4	3	2	0	
Deliverables are accurately identified and scheduled to be provided in time to meet Consortium needs	5	4	3	2	0	
Major dependencies within the schedule have been identified	5	4	3	2	0	
<b>D. Deliverables</b>						
Deliverables are identified and clearly described	5	4	3	2	0	
Deliverables will need the Consortium's needs	5	4	3	2	0	
Strategies for monitoring and measuring outcomes are spelled out and appropriate	5	4	3	2	0	
<b>E. Outcomes and Performance Measurement</b>						
Overall work plan is well designed to achieve the stated outcomes	5	4	3	2	0	
Description to monitor/measure outcomes is thorough	5	4	3	2	0	
There is a clear description of how progress toward and delivery of outcomes will be provided to Consortium leadership	5	4	3	2	0	
<b>F. Risks</b>						
Potential risks are identified	5	4	3	2	0	
Strategies to be used to monitor and mitigate risks are described and appropriate	5	4	3	2	0	

Management Proposal (200 points)						
Criteria	E	G	A	M	N	NA
<b>A. Experience/Qualifications of Project Management (80 pts)</b>						
1a. Experience of PROPOSER with similar projects provides solid evidence of ability to meet CONSORTIUM's needs	10	8	5	2	0	
1b. PROPOSER's staff has extensive experience with K-12 education and/or public sector work	10	8	5	2	0	
2a. PROPOSER's provides a substantial list of similar contracts for work on related projects	10	8	6	4	0	
3a. Project management for entire project is adequately staffed in terms of time on project	10	8	6	4	0	
3b. Project management for entire project is highly qualified regarding experience with other projects of similar scope and with similar audiences	10	8	6	4	0	
4a. Management structure and internal controls described are clear and easy to communicate	10	8	6	4	0	
4b. Lines of authority are clear, and access to decision makers appears straightforward	10	8	6	4	0	
5a. The procedures described for escalating concerns is clear and likely to produce effective response	10	8	6	4	0	
<b>B. Structure/Internal Controls for Project Teams</b>						
<b>2.1 COMMUNICATIONS STRATEGIC PLAN (30 pts)</b>						
Project team proposed for this Technical Requirement has the experience to successfully implement the proposal	10	8	6	4	0	
Project team proposed for this Technical Requirement is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this Technical Requirement has the experience and resources to lead to success	10	8	6	4	0	
<b>B. Structure/Internal Controls for Project Teams</b>						
<b>2.2 CONSORTIUM BRANDING (30 pts)</b>						
Project team proposed for this Technical Requirement has the experience to successfully implement the proposal	10	8	6	4	0	
Project team proposed for this Technical Requirement is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this Technical Requirement has the experience and resources to lead to success	10	8	6	4	0	

Management Proposal (Continued)						
<b>B. Structure/Internal Controls for Project Teams</b>						
<b>2.3 COMMUNICATIONS SUPPORT (30 pts)</b>						
Project team proposed for this Technical Requirement has the experience to successfully implement the proposal	10	8	6	4	0	
Project team proposed for this Technical Requirement is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this Technical Requirement has the experience and resources to lead to success	10	8	6	4	0	
<b>B. Structure/Internal Controls for Project Teams</b>						
<b>2.4 SUPPORT FOR REPORTING SYSTEMS (30 pts)</b>						
Project team proposed for this Technical Requirement has the experience to successfully implement the proposal	10	8	6	4	0	
Project team proposed for this Technical Requirement is adequately resourced to successfully implement the proposal	10	8	6	4	0	
Management proposed for this Technical Requirement has the experience and resources to lead to success	10	8	6	4	0	

**Structure/Internal Controls for Project Teams**

Reference Checks (40 points) – <i>Finalists Only</i>						
Criteria	E	G	A	M	N	NA
References						
References show prior experience consistent with needs of project	40	30	20	10	0	NA