



Office of Purchasing  
10910 Clarksville Pike, Ellicott City, Maryland 21042  
(410) 313-6644, fax (410) 313-6789

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April 3, 2019

To All Interested Professional Services Consultants:

The Howard County Public School System (HCPSS) invites your proposal to provide professional consulting services such as school facility planning, demography, public engagement and statistics as well as expertise in geographic information systems (GIS) for facilitation of school boundary review (also known as attendance area adjustments or redistricting) assigned to Office of School Planning of the Howard County Public School System and as specified in the attached Request for Proposals (RFP) No. 060.19.B1. Submittals shall be accepted at the Howard County Department of Education, Purchasing Office, 10910 Clarksville Pike, Ellicott City, Maryland 21042, until **3 p.m. April 18, 2019**.

Late submittals will not be considered. It is the responsibility of each offer or to ensure that its submittal is delivered to the proper place prior to the scheduled closing date and time.

A pre-submission conference will be held **April 12, 2019 at 10:00 a.m.**, at the Howard County Public School System, 10910 Clarksville Pike, Ellicott City, MD 21042. Howard County Public School System staff will explain the scope of work and answer questions that will assist in the preparation of submittals. Attendance is not mandatory; however, it is strongly encouraged. For those unable to physically attend, a conference call-in number is 877 728-0238, passcode 6618937.

Copies of the Request for Proposal may be obtained by visiting the HCPSS website at <http://www.hcpss.org/about-us/purchasing/> or by contacting the Purchasing Office at the address above or by calling (410) 313-6722. Firms are encouraged to visit the website frequently to learn of any changes or updates that may be made in the RFP.

The Howard County Public School System reserves the right to reject in whole or in part any or all submittals.

Sincerely,

A handwritten signature in black ink that reads "D Pindell".

Douglas Pindell  
Director of Purchasing

**REQUEST FOR PROPOSALS**  
**FOR**  
**PROFESSIONAL CONSULTANT SERVICES**

**RFP No. 060.19.B1**

Howard County Public School System  
10910 Clarksville Pike (MD Route 108)  
Ellicott City, Maryland 21042

April 3, 2019

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**PART I  
GENERAL INFORMATION**

**1.1 Purpose**

The Howard County Public School System (HCPSS) issued this Request for Proposals (RFP) to solicit submissions from qualified, professional independent consultants to facilitate school boundary review as assigned to Office of School Planning of the Howard County Public School System and as specified in the attached Request in accordance with the instructions and subject to the requirements hereinafter set forth. Firms are encouraged to review and submit proposals for all the tasks identified tasks or individually.

**1.2 Background**

The School System operates 77 schools (42 elementary schools, 20 middle schools, 12 high schools, and three special schools), with additional office locations in a suburban area. Enrollment is approximately 58,000 PreK to Grade 12 students. For more information on the Howard County Public School System, please visit <http://www.hcpss.org/aboutus>

Respondents to this solicitation are encouraged to review the data contained in HCPSS' website for a better understanding of HCPSS, its organization and management, and the services it provides.

HCPSS presently uses in-house enrollment projections, GIS layers, capacity analysis and facility information system.

**1.3 Obligations of HCPSS**

HCPSS shall pay no costs or other amounts incurred by any entity in responding to this RFP or prior to the effective date of the contract entered into for the services provided. HCPSS reserve the right, in their sole discretion, to select qualified responses to this RFP without discussion of responses with respondents. HCPSS reserves the right to reject any or all submitted responses. All submittals will become a part of the HCPSS official procurement files, and will be available for public inspection.

**1.4 Respondent Obligations**

Qualified consultants are invited to submit responses in accordance with this RFP. Submittals must address all specifications. The Consultant will be liable, both individually and severally, for the performance of all obligations under the contract, and will not be relieved of non-performance of any subcontractor.

Submittals must identify any subcontractors, and outline the contractual relationship between Consultant and each joint respondent or subcontractor. An individual with authority to bind each proposed subcontractor or joint respondent must sign a statement to the effect that the subcontractor or joint respondent has read and agrees to abide by Consultant's obligations under the Contract. The Consultant's submittals must include originals of these statements.

Consultant will be the sole point of contract responsibility. HCPSS will look solely to Consultant for performance of the contract. Consultant will indemnify and hold harmless HCPSS from any claim asserted by or against Consultant, Consultant's subcontractors or joint respondents.

Although not detailed in this document, HCPSS reserve the right to negotiate a contract amendment with the Consultant for additional services that may be required.

### 1.5 Schedule of Events

HCPSS currently anticipate that the selection of a consultant and execution of the Contract will proceed according to the following schedule:

April 2019	Issuance of RFP
April 2019	Deadline for Submission of responses (See invitation letter for specific date and time) <u>Late submittals will not be considered.</u>
May 2019	Contract Execution (or as soon thereafter as practical)

The above dates are subject to change.

### 1.6 Contact

Questions concerning this RFP must be in writing and addressed to Douglas Pindell, Director of Purchasing, dpindell@hcpss.org, HCPSS. Upon issuance of this RFP, other employees and representatives of HCPSS will not answer questions or otherwise discuss the contents of this RFP with any potential respondents or their representatives. Failure to observe this restriction may result in disqualification of any subsequent submittal. This restriction does not preclude discussions unrelated to this RFP.

### 1.7 Respondent Understanding of RFP

By submitting a signed submittal, a respondent represents that it fully understands this RFP and will abide by its terms and conditions, including those appearing as Attachment A to this RFP and the HCPSS Standard Contract that appears as Attachment B to this RFP. No exceptions, amendments, or deviations from this RFP will be allowed in any submittals unless agreed to in writing and raised by the Consultant prior to or during the pre-submittal conference. Unauthorized exceptions, amendments, or deviations in the response may result in disqualification of the submittal.

### 1.8 Deadline for Submission of Responses

**To be considered, submittals must be received in the issuing office the date and time specified in Section 1.5 of this RFP.** See Section 1.10 of this RFP for delivery address. HCPSS prefers hand or overnight delivery. Faxed or electronic responses are not acceptable.

### 1.9 Right to Amend, Modify or Withdraw RFP

HCPSS reserves the right, in their sole discretion, to amend, or modify any provisions of this RFP, or to withdraw this RFP, at any time prior to the award of a Contract, if it is in the best interest of HCPSS to do so. The decision of HCPSS shall be administratively final in this regard.

### 1.10 Issuing Office

HCPSS is the Issuing Office and the sole point of contact for the RFP. HCPSS is the only office authorized to clarify, modify, amend, alter, or withdraw the specifications, terms, and conditions of this RFP and any contract awarded as a result of this RFP. **All communications concerning this procurement must be in writing and addressed to:**

Douglas Pindell, Director of Purchasing  
Howard County Public School System  
10910 Clarksville Pike (MD State Route 108)  
Ellicott City, Maryland 21042  
dpindell@hcpss.org  
Phone: 410 313-6722 Fax: 410 313-6789

Written questions must be received prior to or no later than the pre-submittal conference. HCPSS will make every effort to provide a timely, written response to questions.

### **1.11 Open Records**

Following the award and execution of the contract, responses to this RFP are subject to release as public information unless HCPSS has determined that parts of the submittal are confidential. It is recommended that respondents consult with their legal counsel regarding disclosure issues and take the appropriate precautions to safeguard trade secrets or any other proprietary information.

In the event HCPSS receives a public information request for records related to this RFP, the school system may contact respondents if it believes a portion of this submittal could be considered confidential under the Maryland Public Information Act or other applicable state and federal law. Once contacted, respondents will be asked to submit in writing specific detailed reasons, including any relevant legal authority, stating why it believes the material to be confidential. Vague and general claims as to confidentiality will not be accepted. Final decisions for releasing information are the responsibility of HCPSS based on available information at the time of receipt of the public information request.

Copyrighted submittals are unacceptable and will be disqualified as non-responsive. All submittals become the property of HCPSS.

### **1.12 Written Questions and Official Responses**

**Inquiries concerning this RFP must be in writing and received by the Issuing Office specified in Section 1.10 no later than the date and time specified in Section 1.5 of this RFP.** Telephone inquiries will not be accepted. Questions may be submitted by fax. Responses to inquiries of a general nature will be distributed to all entities filing a letter of intent to submit a submittal. Responses to inquiries of a specific nature will be provided only to the requester. HCPSS reserves the right, in its sole discretion, to determine whether a request is of a general or specific nature.

If a respondent discovers any ambiguities, conflicts, discrepancies, exclusionary specifications, omissions, or other errors in this RFP, respondent must immediately notify the Issuing Office. If a respondent fails to so notify the Issuing Office, such respondent submits a response at its own risk and under such conditions. If such respondent is awarded a contract, then it is not entitled to additional compensation, relief, or time by reason of the error or its later correction.

### **1.13 Time**

The times stated in this document refer to the Eastern Time Zone. Unless otherwise stated in this document, the applicable time deadline will be 3:00 p.m. on the date specified.

HCPSS' regular office hours are 8:30 a.m. to 4:30 p.m., Monday through Friday, except for holidays. Building Services regular office hours are 6:30 a.m. to 4:00 p.m.

### **1.14 Copies**

Respondents must submit one (1) signed original and four (4) copies of their submittals. Respondents must include copies of respondents' cost proposals in their submittal.

**PART II**  
**SUBMITTAL FORMAT**

**2.1 Introduction**

Submittals must be organized as described in Section 2.2 below. Submittals not organized in this manner are subject to disqualification. Conciseness and clarity of content are emphasized and encouraged. Vague and general submittals will be considered non-responsive and disqualified. Submittals must be complete; failure to include all required information may result in disqualification. Submittal pages must be numbered and contain an organized, paginated table of contents corresponding to the sections and pages of the submittal.

**2.2 General Organization of Submittal Contents**

Submittals must be organized as follows:

- a. Transmittal Letter
- b. Executive Summary
- c. Table of Contents
- d. Submittal Information
- e. Cost Proposal (See Appendix D)
- g. Affirmative Action Certification (See Appendix C)
- h. Subcontractor Information, if applicable (See Section 2.6.1)

**2.3 Transmittal Letter**

Respondents must submit with their submittals a transmittal letter that identifies the entity submitting the submittal, all principals, and includes a commitment by that entity to provide the services required by HCPSS. The transmittal letter must state that the submittal is valid for **120 days from the deadline for delivery of submittals. Any submittal containing a term of less than 120 days for acceptance from this deadline will be rejected as non-responsive.**

The transmittal letter must be signed by a person legally authorized to bind respondent to the representations in the response. In the case of a joint submittal, each party must sign the transmittal letter. Respondent also must indicate, in its transmittal letter, why it believes it is the most qualified respondent to provide the requisite services.

The transmittal letter must include a statement of acceptance of the terms and conditions as specified in Appendix A of this RFP and of the contract resulting from this RFP (a copy of the HCPSS Standard Contract appears as Appendix B. If a respondent takes exception to any of the proposed terms and conditions stated in Appendix A or the Standard Contract that appears as Appendix B of this RFP; those exceptions must be noted in the transmittal letter; however, failure to accept those terms and conditions may result in disqualification of the submittal. Respondents are encouraged to submit any questions with regard to terms and conditions and the Standard Contract prior to the deadline set in Section 1.5 of this RFP for the submission of questions.

**2.4 Executive Summary**

Respondents must provide an executive summary of their submittals and represent that respondents' submittals address all of the requirements of this RFP. The executive summary must not exceed three pages, and must represent a full and concise summary of the contents of the submittal. The executive summary must not include any information concerning the cost of the submittal. Respondents must identify any services that are provided beyond those specifically requested. If respondent is providing

services that do not meet the specific requirements of this RFP, but in the opinion of respondent are equivalent or superior to those specifically requested, any such differences must be noted in the executive summary. However, failure to provide the services specifically required may result in disqualification of the submittal.

## 2.5 Table of Contents

Each submittal must be submitted with a table of contents that clearly identifies and denotes the location of each title and subtitle of the submittal. The table of contents must also clearly identify and denote the location of all enclosures of the submittal. The table of contents must follow the RFP's structure as much as is practical.

## 2.6 Respondent Identifying Information

Each respondent must provide the following identifying information:

- a. name and address of business entity submitting the submittal;
- b. all principals;
- c. type of business entity (i.e., corporation, partnership);
- d. state of incorporation or organization and principal place of business;
- e. name and location of major offices and other facilities that relate to respondent's performance under this RFP;
- f. name, address, business and home telephone number, and fax number of respondent's principal contact person regarding the Contract;
- g. respondent's Federal Employer Identification Number;
- h. full name and address for each member, partner, and employee of respondent (and any subcontractors) who will perform services on this project; and
- i. statement regarding the financial stability of respondent, including the ability of respondent to perform the requisite services and additional services included in its response. The most recent audited financial statement of the respondent's organization **may be** requested by HCPSS.
- j. Submittals must document qualifications with experience, examples for each below. Skills sought include:
  1. School Planning Processes – Understanding of industry standards and principles, including, but not limited to feeder patterns, school capacity, capacity utilization, etc. and the ability to apply these towards a comprehensive redistricting process.
  2. Enrollment projection methodology – Understanding of cohort survival methodology and other valid methods for projecting student enrollment. Understand methods of tabulating and expressing data including the use of Excel workbooks and integration with GIS.
  3. Redistricting Scenario testing – Understanding of the geographical application of an enrollment projection to enable testing of alternative boundary scenarios. Understand methods of tabulating and expressing scenario data for on-the-fly analysis.
  4. Community Participation/Facilitation – Understanding of committee meeting facilitation and Maryland Open Meetings Act. Ability to plan and facilitate citizen engagement such as regional meetings, workshops, presentations at various points in the process; (provide data to public about process, scenarios, how to participate, and receive feedback regarding residents' priorities, interests, concerns, scenarios, etc.). Ability to receive feedback from the public via electronic and paper surveys and/or electronic communication, compile and report on public feedback.
  5. Data – Ability to manage secure data transfers, use HCPSS planning units, utilize and maintain data compatibility with ArcGIS platform, develop reports, charts and

maps, report data based on standards in Board policy, and create web based maps/tools.

### **2.6.1 Subcontractor Information**

Respondent must provide statements from each of its proposed subcontractors, signed by an individual authorized to legally obligate each subcontractor, attesting to the fact that it will provide the services as represented in the submittal.

Subcontractors are required to submit ownership information similar to that required of respondents in Section 2.6 above. Respondent must disclose, at HCPSS request, any information regarding subcontractors.

### **2.6.2 Equal Employment Opportunity Practices**

HCPSS is committed to assisting firms that are majority owned by minorities and women. A respondent must state in its submittal whether it is majority owned by minorities and/or women.

Respondents are expected to make every effort to meet or exceed the goal of 25 percent participation by organizations majority owned by Native American/Alaskans, Asian/Pacific Islanders, Blacks, Hispanics, persons with disabilities, and/or women.

Respondents must submit with their submittals completed copies of the Howard County Equal Business Opportunity Certificate and EBO Contract Schedule of Participation Form that appear as Appendix C.

### **2.6.3 Conflict of Interest**

Each respondent must disclose any existing or potential conflict of interest relative to the performance under the Contract. Examples of potential conflicts may include an existing business or personal relationship between respondent, its principal, or any affiliate or subcontractor, with HCPSS or any other entity or person involved in any way in the Contract. Similarly, any personal or business relationship between respondent, the principals, or any affiliate or subcontractor, with any employee of HCPSS or its suppliers must be disclosed. Any such relationship that might be perceived or represented as a conflict must be disclosed. Failure to disclose any such relationship or reveal personal relationships with HCPSS employees may be cause for contract termination. HCPSS reserves the right, in its sole discretion, to determine if an actual or perceived conflict should result in submittal disqualification.

Each respondent must reveal any past or existing relationship between respondent, its principal, employees, or any affiliate or subcontractor, with any state agency, entity, state employee, or other person in any way involved in the state's procurement and/or contracting processes. HCPSS reserves the right, in its sole discretion, to determine if such relationship constitutes a conflict of interest.

In submitting a submittal, a respondent affirms that it has not given, nor intends to give, at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant or any employee or representative of same, in connection with this procurement.

Additionally, by submitting a submittal, respondent represents and warrants that if awarded the Contract, the review would not put respondent in a position of having to review and/or evaluate its own work in a past consulting or business engagement with the system. In any event, such existing and/or past relationships with the system must be disclosed in the submittal.

By submitting a submittal the respondent agrees that, if selected, the Consultant will be independent and not be unduly influenced by any group or individuals, public or private, to include the HCPSS, Maryland State Department of Education, Maryland State Government, or any of its respective employees, members, or representatives.

## **2.7 Submittal Requirements**

Please refer to Part III, below.

## **2.8 Cost Proposal**

Please refer to Section 4.2 and Appendix D, below.

## **2.9 Scope of Work**

Please provide total costs per task and per hour rates for anticipated staff.

### **Task 1: Consultant Orientation**

- Learn criteria used as planning parameters for attendance area adjustments (e.g., fix small feeds, maintain neighborhood continuity, etc.)
- Learn study tasks, i.e., comprehensive redistricting (consider all schools, all levels), focus on specific needs (reduce crowding in one or more regions)
- Communicate with HCPSS leadership regarding goals and priorities for the process
- Discuss roles, functions, and responsibilities for HCPSS and consultant staff

### **Task 2: Data Collection**

- Identify needed data from HCPSS including but not limited to polygon boundaries [planning units], school attendance boundaries, school locations, feeders, capacities, projections and demographic data
- Plan to obtain required data from HCPSS offices and other sources
- Establish secure data transfer and ongoing data security protocols
- Geocoding the student location is NOT needed
- Must have ability to use HCPSS planning units
- Must maintain compatibility with ArcGIS platform

### **Task 3: Provide Impartial Data Analysis**

- Coordinate data verification for base scenario (existing boundaries)
- Demonstrate ability to test scenarios and create required outputs: reports, charts, maps

### **Task 4: School Boundary Scenario Testing**

- Generate alternative boundaries based on direction from staff, Superintendent or Board
- Create required and extemporaneous reports/maps
- Make data available for public use while adhering to HCPSS Data Privacy policy
- Compare plan options using a criteria matrix or other method to quickly compare scenarios against policy criteria

### **Task 5: Facilitate the Attendance Area Committee (AAC)**

- Role of AAC is “to advise and comment on capacity needs and attendance area adjustment recommendations developed by staff”
  - Further direction may be provided by Superintendent
- Create agendas
- Communicate code of conduct for AAC

- Communicate schedule and role of public to community
- Facilitate up to 4 AAC meetings to:
  - Orient AAC to goals, process, Policy 6010 – School Attendance Areas, Maryland Open Meetings Act, group norms
  - Engage all AAC participants in multi-faceted planning exercises
  - Conduct a comprehensive review of boundary study criteria from the Feasibility Study
  - Develop group consensus
- Develop advisory report for Superintendent from AAC consensus

**Task 6: Support Community Engagement and Feedback**

- Work with School Planning and Public Information to develop communication plan to inform residents of process and how to remain involved
- Support connections with diverse audiences
- Support the Board with public engagement during its deliberation process, including facilitating effective public hearings
- Conduct (up to 4) stakeholder meetings for in-person community input regarding existing plans and priorities to assist Superintendent with public input
- Online scenario testing tool for community submission of plans for evaluation
- Report results of feedback to staff/Superintendent to inform recommendations
- Receive public input for Superintendent via survey and report results
- Data-driven reporting on community-suggested scenarios
- Maintain community feedback log
- Create reports/maps on feedback
- Provide web-based maps for public viewing of plan options
- Collect spatially-enabled citizen comments on Feasibility Study and Superintendent options

**Task 7: Superintendent Attendance Area Adjustment Recommendation**

- Present findings and accompanying data of Tasks 6 and 7 to Superintendent/Designee
- Translate those findings into opportunities to develop alternative scenarios
- Receive feedback from Superintendent/Designee
- Advise staff in development of Superintendent recommendation
- Facilitate development of Superintendent recommendation
- Develop Superintendent report with maps/analysis for the Superintendent’s proposed recommendation(s)/options considering all inputs
- Attend meetings with staff on scenario testing for final recommendation
- Attend BOE meeting in support of and/or to present the Superintendent recommendation

**Task 8: Board of Education Redistricting Process**

- Attend up to three (3) public hearings
  - Receive and analyze community feedback and plan options
  - Support the Board with public engagement during its deliberation process, including facilitating effective public hearings
- Attend up to seven (7) Board work sessions
  - Present results of scenario testing
  - Respond to questions
  - Live scenario testing with basic analysis
  - Support development of final BOE redistricting plan for SY 2020-2021

## PART III

### 3.1 Technical Issues

The consultant should prepare their response to the Request for Proposal as described below. For rating purposes, the submittal will be evaluated for the following distinct parts.

#### A. Qualifications

1. Established school planning firm for past five years with experience in impartial data analysis, school boundary scenario testing, committee facilitation, supporting community engagement and feedback, advising and development of Superintendent recommendation, support of the Board of Education review and approval process, and GIS
2. Ability to attending meetings in Ellicott City, Maryland and otherwise coordinate online using online meeting software, FTP, email, phone, or fax.
3. Familiar, by past experience, with state and local government practices, procedures, laws, and regulations
4. Past experience in consultation to include analysis, design, specification preparation, and construction inspection for local government or school systems.
5. Activities and methodologies in accordance with state-of-the-art practices; and accredited, certified, and/or are in accordance with industry standards.
6. Licensed to do business in the state of Maryland.

#### B. Submittals

Company profile, which clearly identifies the following:

1. How long in business under current name.
2. Resume of business principals', including courses or related experience.
3. Resume of lead person(s) for this project, to include related experience.
4. Manpower breakdown - number of personnel by specialty, number of office works, number of field supervisors, number of field workers.
5. Description of pertinent facilities and equipment to include office space by square footage and indicate own or lease.
6. Licensed and allowed to work in the state of Maryland
7. References for similar projects of similar size completed, to include contact person's name and telephone number.
8. Sample of design (1), reports (1) or other related documents
9. Statement of principals' of ownership or investment in other corporations, partnership, or businesses of any nature - state name of business, nature of business, principals' involved, and nature of involvement.
10. Statement as to business and/or principals' involvement in any legal action pending or resolved regarding failure to perform in the state of Maryland during the previous three years, furnish details and outcome.
11. Main office and branch office locations, noting street address and city, state, and zip code.
12. Statement of ability to comply with the insurance requirements identified under **Attachment C**.
13. Statement of compliance and agreement with the Data Sharing Agreement, **Attachment F**.

**C. Interpretation**

1. An expansion of the consultant understands of the desired services as defined in the Specifications (Section D).
2. Specific reference must be made to the sections applicable to tasks, and all other required criteria contained in the Specifications.

**D. Management Team and Approach**

1. Identify key personnel with applicable responsibilities and project team compositions and their place in the firm's organizational structure.
2. Identify the systems and approaches utilized by the firm.
3. The length of time the team has worked together.

**E. Cost/Fee Structure**

1. Outline methods or philosophy that will be utilized to control project costs. This should include specific cost control methods, automation techniques, and the expected use of professional vs. nonprofessional personnel.
2. Consultants shall submit a fee structure utilizing the Proposal Total Sheet - **Attachment A**. Consultants may include addition sheets listing specific positions and hourly rates as it relates to a specific task.

**F. Statutory Affidavit and Non-Collusion Certification (Attachment B).**

**3.2. Computer Capabilities**

When utilizing a computer to perform any computations for a project, the consultant shall include a specific "Computer Services Section" within the submittal that shall contain, as a minimum, the following information:

- A. In the computer Services Section of the submittal, all technical computer description and documentation as required hereinafter, shall be presented.

Specifically, the following must be addressed:

1. Whether the consultant is utilizing his/her own computer, and if not, whose?
  2. The make and basic model of the computer(s) to be used and the basic hardware configuration (number of processors, memory size, mass memory size, and number of tape units).
  3. The application software to be utilized.
- B. The consultant shall estimate the percentage of computer time required for various task functions enumerated under the services to be performed.
- C. The Computer Services Section shall contain the computer documentation of the consultant, as well as all subcontractors, proposing to use computer services for the project.

### **3.3. Financial Information**

Every consultant or joint venture will be required to submit a financial statement, and other financial data requested or required, within 48 hours of the request.

#### **A. Financial Statement**

One copy of said statement is sufficient. The financial statement must be certified by the owner, partner, or officer of the firm, or by a certified public accountant. Financial statements will not be required, at submittal deadline time, from firms who are individuals, or from firms who are proposed for less than \$25,000 of services. However, the school system reserves the right to solicit this information at any time, if said information is deemed relevant.

## PART IV

### SUBMITTAL EVALUATION AND SELECTION PROCESS

#### 4.1 Introduction

This Part details the submittal evaluation and selection process and the mandatory format for submission of the cost portion of submittals (“cost proposals”).

#### 4.2 Cost Proposal

The respondent must utilize the format provided in Appendix D in submitting a cost proposal in response to this RFP. The cost proposal must be included in each copy of the submittal. Any re-worked version of Appendix D that is intended to be a substitute for Appendix D, that is provided by a respondent may be determined as non-responsive, and may result in the submittal’s disqualification.

Respondent must include in its cost proposal all travel and accommodation expenses associated with travel, and all other out-of-pocket expenses required to perform under this project. All such costs will be at the expense of Consultant.

#### 4.3 Submittal Evaluation and Selection

The HCPSS will evaluate submittals on the basis set forth in this section. A contract may be awarded the Contractor whose submittal best meets HCPSS/ requirements and needs at the time of the award.

Submittals shall comprehensively address all of the desired services outlined in the Request for Proposal and shall demonstrate the successful performance of similar contracts by the Contractor making the submittal, and shall offer the most cost effective submittal for the desired services.

Submittals shall be evaluated by an Evaluation and Selection Committee that may request additional technical assistance from any source. The Committee shall first review each submittal for compliance with requirements of the Request for Proposal. The Committee may recommend that the HCPSS/ waive minor irregularities in order to assure quality of service in the remaining areas and if it determines that the decision is in the best interests of HCPSS.

The Committee will use the following criteria and weighing in preparing its technical evaluation of each qualifying submittal:

Qualifications of the Firm	20
Qualifications of the Individuals Proposed	30
Analytic Approach, work plan, fees	50

HCPSS reserves the right to make a single or multiple awards with or without negotiations or to request best and final offers or to make an award without further review. Qualified firms may be requested to provide an oral presentation to the Selection Committee.

**PART V**  
**PAYMENTS**

**5.1 Payments**

HCPSS will make every effort to pay the Contractor within thirty (30) days of acceptance of all deliverables associated with each invoice. Notwithstanding any other provision of this RFP, all invoices must be accompanied with documentation that details the number of hours expended and nature of work performed by Consultant's personnel and subcontractor staff in the performance of work under the Contract.

**APPENDIX A**  
**GENERAL PROVISIONS**

I. CONTRACT AWARD

Any award to furnish services to The Howard County Public School System (referred to as “HCPSS”) shall include, in whole or in part, either attached or incorporated by reference, binding in all respects, these provisions.

II. ORDER OF PRECEDENCE

In the event of an inconsistency among provisions of this Request for Proposal, the inconsistency shall be resolved by the following order of precedence:

- Specifications
- Terms and Conditions
- General Provisions for Professional Services

III. WAIVER OF RIGHT TO BID ON OTHER CONTRACTS

The Consultant agrees that it and its parent, its affiliates and subsidiaries, if any, waive the right to bid on any procurement contracts, of any tier, resulting from the services to be provided under this agreement.

IV. PUBLIC INFORMATION ACT NOTICE

Offerors should give specific attention to the identification of those portions of their submittals that they deem to be confidential, proprietary information or trade secrets and provide any justification of why such materials, upon request, should not be disclosed by HCPSS. Blanket requests for the entire submittal to be held confidential will not be accepted.

HCPSS shall determine, in their sole discretion, which (if any) portions of the Offeror’s submittals shall be confidential.

V. INITIATION OF WORK

The Consultant shall not commence performance of the services until it receives a formal written notice to proceed from HCPSS.

VI. RESPONSIBILITY FOR CLAIMS AND LIABILITY

The Consultant shall be responsible for any personnel injury, loss of life, and damage to or loss of property arising from or related to consultant’s activities or those of its subcontractors, agents, or employees in connection with the services required under this agreement. The Consultant shall indemnify and save harmless HCPSS, its elected officials, officers, agents and employees from and against all claims, suits, demands, judgments, expenses, actions, damages and costs of every name and description, including but not limited to attorneys fees arising out of or resulting from its negligent or wrongful performance or failure of performance of the services of the Consultant under this agreement

or the activities conducted or required to be conducted by the Consultant under this agreement, including its subcontractors, agents, or employees.

VII. PERFORMANCE: SAVE HARMLESS: INSURANCE

- A. The Consultant shall take proper safety and health precautions and to protect his work, his employees, the public and the property of others from any damage or injury resulting solely from the performance of his work described herein.
- B. HCPSS shall be liable for any injuries to the employees, agents, or assignees of the Consultant arising out of or during the course of employment relating to this agreement.
- C. The Consultant has in force, or shall obtain, and will maintain insurance in not less than the amounts specified and accordance with the requirements contained in Attachment A.

VIII. SUBCONTRACTING OR ASSIGNMENT

The benefits and obligations hereunder shall inure to and be binding upon the parties hereto and their respective successors and assigns, provided any such General Provisions for Professional Services successor to the consultant, whether such successor or assign be an individual, a partnership, or a corporation, is acceptable to HCPSS and neither this agreement or the services to be performed thereunder shall be subcontracted, or assigned, or otherwise disposed of, either in whole or in part, except with the prior written consent of HCPSS.

IX. CHANGES ALTERATIONS, OR MODIFICATIONS IN THE SERVICES

HCPSS shall have the right, at their discretion, to change, alter, or modify the services provided for in this agreement and such changes, alterations, or modifications may be made even though it will result in an increase or decrease in the services of the Consultant or in the contract cost thereof.

If such changes cause an increase or decrease in the Consultant's cost of, or time required for, performance of any service under this contract, whether or not changed by an order, an equitable adjustment shall be made and the contract shall be modified in writing accordingly. Any claim of the Consultant for adjustment under this clause must be asserted in writing with 30 days from the date of receipt by the Consultant of the notification of change unless the project manager or his duly authorized representative grants a further period of time before the date of final payment under the contract.

No services for which an additional cost or fee will be charged by the Consultant shall be furnished without prior written authorization of HCPSS.

X. DELAYS AND EXTENSIONS OF TIME

The Consultant shall prosecute the work continuously and diligently and no charges or claims for damages shall be made by the Consultant for any delays, acceleration or hindrance, from any cause whatsoever, during the progress of any portion of the services specified in this agreement. Such delays, acceleration or hindrances, if any, may be compensated for by an extension of time for such reasonable period as HCPSS may decide. Time extensions will be granted only for excusable delays such as delays beyond the control and without the fault or negligence of the Consultant.

XI. REMEDIES AND TERMINATION

- A. ***Correction of Errors, Defects, and Omissions*** - The Consultant agrees to perform work as may be necessary to correct errors, defects, and omissions in the services required under this

agreement without undue delays and without cost to HCPSS. The acceptance of the work set forth herein by HCPSS shall not relieve the Consultant of the responsibility.

B. ***Set-Off*** - HCPSS may deduct from and set-off against any amounts due and payable to the Consultant any back-charges or damages sustained by HCPSS by virtue of any breach of this agreement by the Consultant to perform the services or any part of the services in a satisfactory manner. Nothing herein shall be construed to relieve the Consultant of liability for additional construction and design or other costs, expenses, and damages resulting from a failure to satisfactorily perform the services. Nothing herein shall limit the liability of the Consultant for damages and HCPSS may affirmatively collect damages from the Consultant.

C. ***Termination for Default*** - If the Consultant fails to fulfill its obligations under this contract properly and on time, otherwise violates any provision of the contract, HCPSS may terminate the contract by written notice to the Consultant. The notice shall specify the acts of omissions relied on as cause for termination. All finished or unfinished supplies and services provided by the Consultant, shall at HCPSS's option, become HCPSS property. HCPSS shall pay the Consultant fair and equitable compensation for satisfactory performance prior to receipt of notice of termination, less the amount of damages caused by Consultant's breach.

If the damages are more than the compensation payable to the Consultant, the Consultant will remain liable after termination and HCPSS can affirmatively collect damages.

D. ***Termination for Convenience of HCPSS*** - HCPSS may terminate all or any part of the work required under this contract for the convenience of HCPSS. In the event of such termination, the contract manager shall determine the costs the Consultant has incurred to the date of termination and such reasonable costs associated with the termination. HCPSS shall pay such costs as determined by the contract manager to the Consultant together with reasonable profit reasonably earned by the Consultant to the time of termination but not to include any profit not earned as of the date of termination.

E. ***Obligations of Consultant upon Termination*** - Upon notice of termination as provided in Paragraphs C and D above, the consultant shall:

1. Take immediate action to orderly discontinue its work and demobilize its work force to minimize the occurrence of costs.
2. Take such action as may be necessary to protect the property of HCPSS, place no further orders or subcontract, assign to HCPSS in the manner and to the extent directed by HCPSS all of the right, title and if ordered by HCPSS possession and interest of Consultant under the orders or subcontracts terminated.
3. Deliver to HCPSS all materials, equipment, data, drawings, specifications, reports, estimates, and such other information accumulated by the Consultant which has been or will be reimbursed under this agreement after taking into account any damages that may be payable to HCPSS. Title to such items shall be transferred to HCPSS.

F. ***Remedies Not Exclusive*** - The rights and remedies contained in this general condition are in addition to any other right or remedy provided by law, and the exercise of any of them is not a waiver of any other right or remedy provided by law.

XII. RESPONSIBILITY OF CONSULTANT

- A. The Consultant shall perform the services with that standard of care, skill, and diligence normally provided by a consultant, architect, or engineer in the performance of services similar to the services hereunder.
- B. Notwithstanding any review, approval, acceptance, or payment for the services by HCPSS, the Consultant shall be responsible for professional and technical accuracy of its work furnished by the Consultant under this agreement.
- C. HCPSS's review, approval, or acceptance of, nor payment for, any of the services required under this contract shall be construed to operate as a waiver of any rights under this contract or of any cause of action arising out of the performance of this contract, and the Consultant shall be and remain liable to HCPSS in accordance with applicable law for all damages to HCPSS caused by the Consultant's negligent performance of any or the services furnished under this contract.
- D. The rights and remedies of HCPSS provided for under this contract are in addition to any rights and remedies provided by law.

XIII. DISPUTES; GOVERNING LAW

Except as otherwise provided in these contractual documents, any claim, dispute, or other matter in question concerning a question of fact shall initially be referred to the HCPSS contract manager. Any claim, dispute, or other matter in question concerning a question of fact referred to the contract manager that is not disposed of by agreement shall be referred to the purchasing officer, HCPSS, who shall reduce his decision to writing and mail or otherwise furnish a copy to the Consultant. The decision of HCPSS shall be final and conclusive.

The contract shall be governed by the law of the State of Maryland and nothing in this contract shall be interpreted to preclude the parties from seeking, after completion or termination of the agreement, all remedies provided by law.

XIV. EXAMINATION OF RECORDS

The Consultant agrees that the auditor of HCPSS any of their duly authorized representatives shall, until expiration of three years after final payment under this contract, have access to and the right to examine any directly pertinent books, documents, papers, and records of the Consultant involving transactions related to this contract.

XV. DISSEMINATION OF INFORMATION

During the term of this agreement, the Consultant shall not release any information related to the services or performance of the services under this agreement nor publish any final reports or documents without the prior written approval of the HCPSS contract manager.

XVI. NON-HIRING OF EMPLOYEES

No employee of the Board of Education of Howard County or any department, commission, or agency or branch thereof, whose duties as such employee include matters relating to or affecting the subject matter of this contract, shall, while such employee, become or be an employee of the party or parties hereby contracting with said HCPSS, or any department, commission, agency or branch thereof.

XVII. CONTINGENT FEE PROHIBITION

- A. The Consultant warrants that they have not employed or retained any person, partnership, corporation, or other entity, other than a bona fide employee or agent working for the consultant, to solicit or secure this agreement, and that they have not paid or agreed to pay any person, partnership, corporation, or other entity, other than a bona fide employee or agent, any fee or any other consideration contingent on the making of this agreement.
- B. For breach or violation of this warranty, HCPSS shall have the right to terminate this agreement without liability, or, at its discretion, to deduct from the contract price or consideration, or percentage, brokerage fee, gift or contingent fee.

XVIII. MULTI-YEAR CONTRACTS CONTINGENT UPON APPROPRIATIONS

Funds have been set-aside for the anticipated term of this contract. Should, for any reason, the Contractor's work extend beyond the current fiscal year, this contract will be subject to termination in accordance with the Termination for Convenience Section, if the Board of Education of Howard County fails to appropriate funds for any fiscal year for the future performance of the contract.

HCPSS, however, reserves the right to negotiate with the Consultant to perform additional tasks not specified in this RFP that may be required in order to assure that the Consultant's recommendations are implemented and are having the desired effects.

XIX. COMPLIANCE WITH LAW

The consultant hereby represents and warrants:

- A. That it is qualified to do business in the State of Maryland and that it will take such action as, from time to time hereafter, may be necessary to remain so qualified.
- B. That it is not in arrears with respect to the payment of any monies due and owing the county or state, of any department or agency thereof, including but not limited to the payment of taxes and employee benefits, and that it shall not become so in arrears during the term of this agreement.
- C. That it shall comply with all federal, state, and local law, ordinances and legally enforceable rules and regulations applicable to its activities and obligations under this agreement.
- D. That it shall procure, at its expense, all licenses, permits, insurance, and governmental approval, if any, necessary to the performance of its obligations under this agreement.
- E. That the facts and matters set forth hereafter in the "Contract Affidavit" which is attached to this agreement and made a part hereof are true and correct.
- F. Compliance with the school system's Confidentiality and Data Security requirement, Appendix F.

XX. STAFF

The consultant shall utilize the personnel named and/or otherwise identified in its submittal to perform services required. In the event that any of the personnel named are unable to perform because of death, illness, resignation from the Consultant's employ, or similar reasons, the Consultant shall promptly submit to the contract manager, in writing, the name and qualifications of the proposed replacement. No substitutions shall be made without the proper written approval of the contract manager.

**APPENDIX B**  
**STANDARD CONTRACT**

**AGREEMENT FOR PROFESSIONAL SERVICES**

AGREEMENT # \_\_\_\_\_

THIS AGREEMENT is entered into this \_\_\_\_\_ Date, effective as of this date, by and between the Board of Education of Howard County (hereinafter referred to as the "Board") and \_\_\_\_\_ Contractor, (hereinafter referred to as the "Contractor").

**RECITALS**

WHEREAS, the Contractor submitted a proposal to RFP #060.19.B1 issued by the Board and has been selected to perform professional services in accordance with the terms and conditions expressed in the RFP;

WHEREAS, the Board desires the Contractor to perform certain work and services, on the terms and conditions herein set forth and the Contractor is ready, willing, and able to perform such work and services; and

WHEREAS, Board desires the Contractor to perform certain work and services, on the terms and conditions herein set forth and the Contractor is ready, willing, and able to perform such work and services; and

WHEREAS, this Agreement shall be administered by the Project Manager or such other persons designated by The Board of Education.

NOW, THEREFORE, in consideration of the promises contained herein and the promises each to the other made, the parties hereby agree as follows:

**ARTICLE I - CATEGORY OF WORK AND SERVICES**

- 1. The work and services to be performed by the Contractor shall be in accordance with the following documents:

Request for Proposal \_\_\_\_\_, RFP No. 060.19.B1, dated \_\_\_\_\_, 2019; and  
\_\_\_\_\_ (contractor name) proposal dated \_\_\_\_\_ date.

**ARTICLE II - TERMS AND CONDITIONS**

Contractor agrees to perform the work and services required under this Agreement in accordance with RFP #060.19.B1, whose provisions for professional services are incorporated herein by reference.

**ARTICLE III - TERM OF AGREEMENT**

The term of agreement shall begin upon award for a period of one year with up to four (4) one-year renewals. Contract renewals shall be contingent upon adequate fiscal appropriations as per the RFP and satisfactory performance.

**ARTICLE IV - PAYMENTS AND SCHEDULE OF PAYMENTS**

- (1) The Contractor shall receive compensation within 30 days of invoice date.
- (2) Payment shall be made in accordance with the provisions set forth in section 5.1.

**ARTICLE VI - INSURANCE**

The Contractor agrees to and has complied with the insurance requirements set forth in the RFP.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the day and year first above-written.

BOARD OF EDUCATION OF HOWARD  
COUNTY

By: \_\_\_\_\_ (SEAL)  
Mavis Ellis, Chair  
Board of Education of Howard County

WITNESS:

By: \_\_\_\_\_ (SEAL)  
Michael J. Martirano, Superintendent

WITNESS:

By: \_\_\_\_\_  
Signature  
\_\_\_\_\_  
Typed                      Title  
\_\_\_\_\_  
Company Name  
\_\_\_\_\_  
Address  
\_\_\_\_\_  
City,                      State      Zip  
\_\_\_\_\_  
Telephone                      Fax

**APPENDIX C**

**EQUAL BUSINESS OPPORTUNITY  
CONTRACT SCHEDULE OF PARTICIPATION FORM**

**SCHEDULE FOR PARTICIPATION OF CERTIFIED MINORITY BUSINESS ENTERPRISES**

1. Prime Contractor's Name	2. Prime Contractor's Address and Telephone		
3. Project/School Name	4. Project/School Location		
5. PSC No.	6. Base Bid Amount	\$	_____
	Plus Accepted Alternates	\$	_____
	Total Contract Amount	\$	_____
<b>7a. Minority Firm Name</b>	Minority Firm Address		
Minority Firm Telephone Number	Minority Group Type		
Minority Firm Fax Number	O (African American)	O(Women Owned)	
<b>MDOT Certification Number</b>	O (Asian )	O(Hispanic)	
	O (American Indian)	O(Disabled)	
Subcontract Dollar Amount	Percent of Total Contract		
<b>7b. Minority Firm Name</b>	Minority Firm Address		
Minority Firm Telephone Number	Minority Group Type		
Minority Firm Fax Number	O (African American)	O(Women Owned)	
MDOT Certification Number	O (Asian)	O(Hispanic)	
	O (American Indian)	O(Disabled)	
Subcontract Dollar Amount	Percent of Total Contract		
<b>7c.. Minority Firm Name</b>	Minority Firm Address		
	Minority Group Type		
Minority Firm Telephone Number	O (African American)	O(Women Owned)	
	O (Asian)	O(Hispanic)	
Minority Firm Fax Number	O (American Indian)	O(Disabled)	
MDOT Certification Number			
Subcontract Dollar Amount	Percent of Total Contract		
8. MBE Total Dollar Amount	9. Total MBE Percent of Entire	Contract	
10. Form Prepared by :			
Name	Name		
Title	Title		
Date	Date		

**APPENDIX D**  
**FORM FOR COST PROPOSAL**

**I. FEE STRUCTURE**

**Task 1 Consultant Orientation** \$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_

Project Engineer \$ \_\_\_\_\_

Designer/Drafter \$ \_\_\_\_\_

GIS Technician \$ \_\_\_\_\_

Administrative Support \$ \_\_\_\_\_

Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

\*NOTE: This hourly rate is all inclusive of overhead, profit, administrative fees, direct and indirect costs. No other expenses or fees will be added to this hourly rate.

**Task 2 Data Collection** \$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_

Project Engineer \$ \_\_\_\_\_

Designer/Drafter \$ \_\_\_\_\_

GIS Technician \$ \_\_\_\_\_

Administrative Support \$ \_\_\_\_\_

Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

**Task 3 Provide Impartial Data Analysis** \$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_

Project Engineer \$ \_\_\_\_\_

Designer/Drafter \$ \_\_\_\_\_

GIS Technician \$ \_\_\_\_\_

Administrative Support \$ \_\_\_\_\_  
Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

**Task 4 School Boundary Scenario Testing** \$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_  
Project Engineer \$ \_\_\_\_\_  
Designer/Drafter \$ \_\_\_\_\_  
GIS Technician \$ \_\_\_\_\_  
Administrative Support \$ \_\_\_\_\_  
Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

**Task 5 Facilitate the Attendance Area Committee (AAC)** \$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_  
Project Engineer \$ \_\_\_\_\_  
Designer/Drafter \$ \_\_\_\_\_  
GIS Technician \$ \_\_\_\_\_  
Administrative Support \$ \_\_\_\_\_  
Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

**Task 6 Support Community Engagement and Feedback** \$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_  
Project Engineer \$ \_\_\_\_\_  
Designer/Drafter \$ \_\_\_\_\_  
GIS Technician \$ \_\_\_\_\_  
Administrative Support \$ \_\_\_\_\_

Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_  
(Attach additional sheets if necessary)

**Task 7 Superintendent Attendance Area Adjustment Recommendation**

\$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_

Project Engineer \$ \_\_\_\_\_

Designer/Drafter \$ \_\_\_\_\_

GIS Technician \$ \_\_\_\_\_

Administrative Support \$ \_\_\_\_\_

Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

**Task 8 Board of Education Redistricting Process**

\$ \_\_\_\_\_ lump sum

Work Classification

Hourly Rate\*

Principal \$ \_\_\_\_\_

Project Engineer \$ \_\_\_\_\_

Designer/Drafter \$ \_\_\_\_\_

GIS Technician \$ \_\_\_\_\_

Administrative Support \$ \_\_\_\_\_

Other (Specify): \_\_\_\_\_ \$ \_\_\_\_\_

(Attach additional sheets if necessary)

**II. ADDENDUM**

The bidder acknowledges receipt of the following addenda:

Addendum No. \_\_\_\_\_

Addendum No. \_\_\_\_\_

Addendum No. \_\_\_\_\_

III. PROPOSAL SUBMITTED BY:

---

Signature Date

---

Print or Type Name Title

---

Company Name

---

Street Address

---

City, State Zip

---

Contact Telephone No. Fax No.

**APPENDIX E**

**AFFIDAVIT**

Special Instructions: An authorized representative of the offeror needs to complete the following affidavit and insert an answer to paragraphs 1 and 3.

Statutory Affidavit and Non-Collusion Certification

I, \_\_\_\_\_, being duly sworn, depose and state:

1. I am the \_\_\_\_\_ (officer) and duly authorized representative of the firm (the "Firm") \_\_\_\_\_ whose address is \_\_\_\_\_ and that I possess the authority to make this affidavit and certification on behalf of myself and the firm for which I am acting.

2. Except as described in paragraph 3 below, neither I, nor to the best of my knowledge, the above Firm, nor any of its officers, directors, or partners, or any of its employees who are directly involved in obtaining or performing contracts with any public bodies has:

(a) been convicted of bribery, attempted bribery, or conspiracy to bribe, under the laws of any state or of the federal government;

(b) been convicted under the laws of the state, another state, or the United States of: a criminal offense incident to obtaining, attempting to obtain, or performing a public or private contract; or fraud, embezzlement, theft, forgery, falsification or destruction of records, or receiving stolen property;

(c) been convicted of a criminal violation of an antitrust statute of the State of Maryland, another state, or the United States;

(d) been convicted of a violation of the Racketeer Influenced and Corrupt Organization Act, or the Mail Fraud Act, for acts in connection with the submission of bids or proposals for a public or private contract;

(e) been convicted of any felony offenses connected with obtaining, holding, or maintaining a minority business enterprise certification, as prohibited by Section 14-308 of the State Finance ~ Procurement Article;

(f) been convicted of conspiracy to commit any act or omission that would constitute grounds for conviction under any of the laws or statutes described in paragraph (a) through (e) above; or

(g) been found civilly liable under an antitrust statute of this State, another state, or the United States for acts or omissions in connection with the submission of bids or proposals for a public or private contract.

3. The only conviction, plea, or admission by any officer, director, partner, or employee of this Firm to involvement in any of the conduct described in paragraph 2 above is as follows:

If none, write "None" below. If involvement, list the date, count, or charge, official or administrative body, the individuals involved, their position with the firm, and the sentence or disposition of the charge.

\_\_\_\_\_  
\_\_\_\_\_

(You may attach any explanation necessary.)

4. I affirm that this firm will not knowingly enter into a contract with a public body under which a person or business debarred or suspended under Maryland State Finance and Procurement Title 16, subtitle 3, Annotated Code of Maryland, as amended, will provide, directly or indirectly, supplies, services, architectural services, construction-related services, leases of real property, or construction.
5. I affirm that this proposal or bid to the Board of Education of Howard County is genuine and not collusive or a sham; that said offeror has not colluded, conspired, connived and agreed, directly or indirectly, with any bidder or person to put in a sham bid or proposal or to refrain from bidding or making a proposal and is not in any manner, directly or indirectly, sought by agreement of collusion or communication or conference, with any person to fix the prices of the affidavit or any other person, or to fix any overhead, profit or cost element of said price, or that if any person, or to secure an advantage against the Board of Education of Howard County or any other person interested in the proposed contract; and that all statements in the proposal or bid are true. I acknowledge that, if the representations set forth in this affidavit are not true and correct, the Board of Education of Howard County may terminate any contract awarded and take any other appropriate action.
6. I affirm that this firm will not knowingly employ an individual to work at a school if the individual is a Registered Sexual Offender, pursuant to section 11-722 (C) of the Criminal Procedure Article of the Annotate Code of Maryland. A firm or person who violates this section is guilty of a misdemeanor and on conviction is subject to imprisonment not exceeding 5 years or a fine not exceeding \$5,000 or both.

**The statements contained in this affidavit shall be incorporated into the awarded contract as material provisions and shall be effective throughout the life of the contract. The firm has a continuing obligation through the life of the contract to submit a revised affidavit should the firm discover information, or events occur, which render the contents of this affidavit erroneous or incomplete or which would result in the firm providing a different response. The firm's failure to submit a revised affidavit within three (3) working days of either its awareness of any error, change of circumstances, incompleteness, etc., or request by the owner shall constitute breach of contract. Upon submission of a revised affidavit, the owner has the right to take such actions as may be necessary, in the judgment of the owner, to maintain and enforce the provisions of the affidavit, including termination of the contract.**

Continued on next page

**I DO SOLEMNLY DECLARE AND AFFIRM** under the penalties of perjury that the contents of these affidavits (Statutory and Non-Collusion) are true and correct, that I am executing this Affidavit in compliance with Section 16-311 of the State Finance and Procurement Article, Annotated Code of Maryland, and the Non-Collusion Certification in compliance with requirements of the Howard County Board of Education, and that I am executing and submitting this Form of Proposal on behalf of and as authorized by the bidder named below.

\_\_\_\_\_

WITNESS: \_\_\_\_\_ Title: \_\_\_\_\_

SUBSCRIBED AND SWORN to before me on this \_\_\_\_\_ day of \_\_\_\_\_, 2019.

\_\_\_\_\_  
NOTARY PUBLIC  
My Commission Expires: \_\_\_\_\_

\_\_\_\_\_  
(Legal Name of Company)

\_\_\_\_\_  
(Address)

\_\_\_\_\_  
(City) \_\_\_\_\_ (State) \_\_\_\_\_ (Zip)

\_\_\_\_\_  
(Telephone) \_\_\_\_\_ (Fax)

Contractor's No. \_\_\_\_\_

\_\_\_\_\_  
(Signature) \_\_\_\_\_ (Title) \_\_\_\_\_ (Date)

\_\_\_\_\_  
(Printed)

In the presence of \_\_\_\_\_  
(Witness) \_\_\_\_\_ (Date)

We are/I am licensed to do business in the State of Maryland as a:  
 Corporation     Partnership     Individual     Other

## APPENDIX F

### DATA SHARING AGREEMENT

HCPSS, as a Government entity, is required when entering into agreements with other parties to follow all applicable laws and regulations, including those related to data privacy and security; accessibility; and records retention. Accordingly, the ENTITY's Terms of Service (TOS) are hereby modified by this Amendment as they pertain to HCPSS's use of the ENTITY's Site and/or Services and the ENTITY's access to and use of HCPSS Client Data as defined herein.

- A. **Definition of "CLIENT Data"**: CLIENT Data include all Personally Identifiable Information (PII) contained in a student's "education record" as defined by the Family Educational Rights and Privacy Act (FERPA) (34 CFR Part 99); and other non-public information that included, but is not limited to: personally identifiable personnel data, personally identifiable student data, personally identifiable metadata, and personally identifiable user content.
- B. **Data Collection and Use**: ENTITY will collect and use CLIENT Data only for the purpose of fulfilling its duties and providing services under this Agreement, and for improving services under this Agreement.
- C. **Education Records**: If ENTITY will have access to "education records" as defined under the Family Educational Rights and Privacy Act (FERPA) (34 CFR Part 99), the ENTITY acknowledges that for the purpose of this Agreement it will be designated as a 'school official' with 'legitimate educational interests' and will use the data only for the purpose of fulfilling its duties under this Agreement. ENTITY agrees to indemnify and hold harmless the Board of Education of Howard County for any damages or costs, including reasonable attorney's fees, which arise out of any negligence or misconduct by ENTITY, its agents and employees concerning its FERPA obligations under this section.
- D. **Obligation of Confidentiality**: In performing services under this Agreement, ENTITY and CLIENT may be exposed to and will be required to use certain "Confidential Information", as defined below. ENTITY and CLIENT along with their employees, agents or representatives will not, use, directly or indirectly, such Confidential Information for purposes other than the purposes outlined in this Agreement.
- E. **Definition of Confidential Information**: "Confidential Information" means information, not generally known, and proprietary to the ENTITY or CLIENT or to a third party for whom the ENTITY or CLIENT is performing work, including, without limitation, information concerning any patents or trade secrets, confidential or secret designs, processes, formulae, source codes, plans, devices or material, research and development, proprietary software, analysis, techniques, materials or designs (whether or not patented or patentable), directly or indirectly useful in any aspect of the business of the ENTITY or CLIENT. Confidential Information includes all information which ENTITY or CLIENT acquires or becomes acquainted with during the period of this Agreement, whether developed by ENTITY, CLIENT or others, which ENTITY or CLIENT has a reasonable basis to believe to be Confidential, such as data that is personally identifiable to an individual student and information within the definition of "Education Record." The parties agree that the following will be treated as "Confidential Information": (i) all database information ("Data") provided by or on behalf of CLIENT to ENTITY; (ii) all information provided by ENTITY to CLIENT pertaining to the Services; (iii) all information which is labeled as such in writing and prominently marked as "Confidential," "Proprietary" or words of similar meaning by either party; or (iv) business information of a party which a reasonable person would understand under the circumstances to be confidential.
- F. **Maintenance of Confidentiality**: Any Confidential Information acquired or received by either party (the "Recipient") in the course of this Agreement will not be disclosed or transferred to any person or entity other than to employees of a party and, as to ENTITY, for the purpose of performing its obligations under this Agreement. Confidential Information received under this Agreement will be treated with the same degree of care and security as each party uses with respect to its own Confidential Information, but not less than a reasonable degree of care. The parties agree to use Confidential Information only for the purpose of performance of this Agreement and to make no copies except as necessary for performance of this Agreement. Any such confidential information and copies thereof made by a party, or any representative of a party, shall be completely and promptly destroyed at the conclusion of contract performance subject to paragraph F.1 below.
  - 1. Upon termination or completion of the Services hereunder, upon request of CLIENT, ENTITY will delete the CLIENT's Confidential Information as housed in the ENTITY production database(s), provided that ENTITY may

maintain archival copies for audit purposes and dispute resolution purposes and ENTITY may retain copies of Confidential Information on back-up media in which such Data is co-resident with other employment and income data. ENTITY shall remain under its contractual obligation of confidentiality and security to CLIENT and such obligations shall survive termination of the Agreement. This Section shall survive the termination of this Agreement.

- G. *Data De-Identification:*** ENTITY may use de-identified Data for product development, research, or other internal purposes. De-identified Data will have all direct and indirect personal identifiers removed. This includes, but is not limited to, name, ID numbers, date of birth, demographic information, location information, and school ID. Furthermore, ENTITY agrees not to attempt to re-identify de-identified Data.
- H. *Data Mining, Marketing and Advertising:*** Except as indicated in Section G above, ENTITY is prohibited from mining CLIENT Data for any purposes other than those agreed to by the parties. **Data mining or scanning of user content for the purpose of advertising or marketing to students or their parents is prohibited. Any and all forms of advertisement, directed towards children, parents, guardians, or District Employees will be strictly prohibited unless allowed with express written consent of the District.**
- I. *Modification of Terms of Service:*** ENTITY will not change how CLIENT Data are collected, used, or shared under the terms of this Agreement in any way without advance notice to the CLIENT. This Agreement is the entire agreement between the CLIENT (including all District end users) and the ENTITY. All other agreements or understandings, whether electronic, click-through, verbal or in writing, with District Employees or other End Users shall be null and void.
- J. *Data Sharing:*** ENTITY will not share CLIENT data, with or disclose it to any third party, except to affiliated subcontractors, agents, or third-party service providers of the ENTITY, without prior specific and informed written consent of the CLIENT, except as required by law.
- K. *Data Storage:*** CLIENT Data will not be stored outside of the United States without prior, specific and informed written consent from the CLIENT.
- L. *Terms, Data Transfer, Survival and Destruction:*** The CLIENT may immediately terminate the Agreement if the CLIENT determines the ENTITY has breached this Agreement. The Agreement will automatically terminate at the expiration date. However, the ENTITY's obligations shall survive termination of this Agreement until ALL CLIENT Data has been returned and/or securely removed or destroyed. ENTITY will ensure that all Data in its possession and in the possession of any subcontractors, or agents to which the ENTITY may have transferred Data, are destroyed.
- M. *Rights and License in and to Data:*** All goods, products, materials, documents, reports, writings, video images, photographs, papers and intellectual property of any nature including software or computer images prepared by the ENTITY (or subcontractors) for the CLIENT or from CLIENT-provided material will not be disclosed to any other person or entity and remains the property of the school system. All student-produced work remains the property of the school system or that eligible student. The ENTITY has a limited, nonexclusive license to the data described herein solely for the purpose of performing its obligations as outlined in the Agreement. This Agreement does not give ENTITY any rights, implied or otherwise, to Data, content, or intellectual property, except as expressly stated in the Agreement, including any right to sell or trade Data.
- N. *Access:*** Except as otherwise expressly prohibited by law, the ENTITY will immediately notify the CLIENT of any subpoenas, warrants, or other legal orders, demands or requests, including Audits, and governmental requests and demands, received by the ENTITY seeking CLIENT Data. If the CLIENT receives a similar request, the ENTITY will promptly supply the CLIENT with copies of records or information required by the CLIENT to respond.
- O. *Security Controls and Risk Management:*** ENTITY will store and process CLIENT Data in accordance with industry best practices. This includes appropriate administrative, physical, and technical safeguards to: 1) ensure the security and confidentiality of PII and Confidential Information; 2) protect against any anticipated threats or hazards to the security or integrity of Confidential Information; 3) protect against unauthorized access to or use of Confidential Information that could result in substantial harm or inconvenience to any customer or to any client employee and/or student; and 4) dispose of PII

and Confidential Information in a secure manner.

1. To comply with the safeguard obligations generally described above, ENTITY has (a) designated an employee to coordinate its information security program, (b) identified reasonably foreseeable internal and external risks to the security, confidentiality, and integrity of CLIENT Information that could result in the unauthorized disclosure, misuse, alteration, destruction, or other compromise of such information, and assessed the sufficiency of any safeguards in place to control these risks, and (c) designed and implemented information safeguards to control the risks identified through the risk assessment, and regularly tests or otherwise monitors the effectiveness of safeguards' key controls, systems and procedures.
  2. ENTITY will conduct periodic risk assessments and remediate any identified security vulnerabilities in a timely manner. ENTITY will also have a written incident response plan, to include prompt notification of HCPSS in the event of a security or privacy incident, as well as best practices for responding to a breach of PII.
- P. *Data Breaches:*** ENTITY shall notify CLIENT in writing as soon as commercially practicable, however no later than forty-eight (48) hours, after ENTITY has either actual or constructive knowledge of a breach which affects the confidentiality, integrity, and/or accessibility of CLIENT's Data (an "Incident") unless it is determined by law enforcement that such notification would impede or delay their investigation. ENTITY shall have actual or constructive knowledge of an Incident if ENTITY actually knows there has been an Incident or if ENTITY has reasonable basis in facts or circumstances, whether acts or omissions, for its belief that an Incident has occurred. The notification required by this section shall be made as soon as commercially practicable after the law enforcement agency determines that notification will not impede or compromise the investigation. ENTITY shall cooperate with law enforcement in accordance with applicable law provided however, that such cooperation shall not result in or cause an undue delay to remediation of the Incident. ENTITY shall promptly take appropriate action to mitigate such risk or potential problem at ENTITY's expense. In the event of an Incident, ENTITY shall, at its sole cost and expense, restore the Confidential Information, to as close its original state as practical, including, without limitation any and all Data, and institute appropriate measures to prevent any recurrence of the problem as soon as is commercially practicable.
- Q. *Employee and Subcontractor Qualifications:*** ENTITY shall ensure that its employees and all subcontractors who have potential access to CLIENT Data have undergone appropriate background screening and possess all needed qualifications to comply with the terms of this Agreement. Further, all employees and subcontractors are subject to the same FERPA compliance in relation to the 'school official' designation, and should receive training that the re-disclosure of PII and/or Confidential Information will violate federal and state laws and may result in criminal and/or civil penalties.
- R. *Governing Law:*** This agreement shall be governed by and construed in accordance with the laws of Maryland, excluding its choice of law rules. Any action or proceeding seeking any relief under or with respect to this Agreement shall be brought solely in the appropriate Maryland Court. ENTITY will comply with Maryland Education Code ANN. § 4-131, "Operators of School Internet Web sites, Online Services, Online Applications, and Mobile Applications." ENTITY agrees to be bound as an "operator" under the law regardless of the ENTITY's exemptions that may exist in Maryland Education Code ANN. § 4-131(a)(3).
- S. *Compliance:*** In addition to complying with FERPA and the Maryland Education Code cited above, the ENTITY shall ensure that its products and services comply with the Federal Protection of Pupil Rights Act (34 CFR Part 98), the Federal Children's Internet Protection Act (47 CFR 54.520), and the Federal Children's Online Privacy and Protection Act (16 CFR Part 312).
- T. *Monitoring:*** The ENTITY agrees to allow the HCPSS the ability to audit the ENTITY's use of HCPSS data to ensure compliance with the terms of this agreement.
- U. *Indemnification:*** ENTITY agrees to indemnify and hold harmless HCPSS, and its members, trustees, employees, agents, officers, and officials, from and against any and all liabilities, taxes, tax penalties, interest, losses, penalties, damages, and expenses of any kind, nature, or character, including costs and attorney fees, arising out of or relating to any and all claims, liens, damages, obligations, actions, suits, judgments, settlements, or causes of action of every kind, nature, or character, in

connection with or arising out of the acts or omissions of either entity or its employees, subcontractors, or agents under this Agreement. This provision expressly applies to, but is not limited in application to, matters and circumstances involving or implicating the unauthorized use of any trade secrets, or United States patent or copyright infringement or any liability resulting from the unauthorized disclosure of PII or Confidential Information or a breach of the obligations contained in this Data Sharing Agreement, including those set forth in paragraph R above. The indemnities set forth herein will survive the expiration or termination of this Agreement.

HCPSS agrees to indemnify and hold harmless ENTITY, and its members, trustees, employees, agents, officers, and officials, from and against any and all liabilities, taxes, tax penalties, interest, losses, penalties, damages, and expenses of any kind, nature, or character, including costs and attorney fees, arising out of or relating to any and all claims, liens, damages, obligations, actions, suits, judgments, settlements, or causes of action of every kind, nature, or character, arising out of the intentional or malicious acts of HCPSS or its employees, subcontractors, or agents under this Agreement. This provision expressly applies to, but is not limited in application to, matters and circumstances involving or implicating the unauthorized use of any trade secrets, or United States patent or copyright infringement or any liability resulting from the unauthorized disclosure of PII or Confidential Information or a breach of the obligations contained in this Data Sharing Agreement. The indemnities set forth herein will survive the expiration or termination of this Agreement.

### ***SEX OFFENDER REQUIREMENT***

VENDOR affirms that it will not knowingly employ an individual to work at a school if the individual is a Registered Sexual Offender, pursuant to section 11-722 (C) of the Criminal Procedure Article of the Annotate Code of Maryland. A firm or person who violates this section is guilty of a misdemeanor and on conviction is subject to imprisonment not exceeding 5 years or a fine not exceeding \$5,000 or both.

VENDOR agrees to perform the work and services required under this Agreement, whose provisions for professional services are incorporated herein by reference. Contractor shall diligently ensure compliance with the criminal background requirement for employees assigned to the work under this Agreement. Background investigations include a criminal records history check through the employee's State criminal records repository via submission of the employee's ten-print fingerprint card. The Board of Education reserves the right to require verification of the criminal records check and State reply upon request. Results must be returned to the employer by the State agency and must be delivered to the Board of Education within 72 hours of receipt by Contractor or within 72 hours of request.

APPENDIX G  
PERFORMANCE SCORECARD

Upon completion of the service or at any time during the service, the awarded contractor shall receive a performance evaluation scorecard rating the contractor's performance providing the service. The evaluation scorecard will become part of the contractor's permanent file. A sample Contractor Performance/Evaluation Scorecard is included with the bid documents.

The evaluation scorecard shall include the following performance indicators; Quality of Work, Responsiveness, Professionalism, Resources, Schedule Management, Quality Control, Deficiency Resolution, Submittal Management, Training, Appearance, Security, Safety, Utility Conservation, Disruptions, Quality of Materials, Emergency Response, Hazardous Materials, Innovation, Teamwork, Cost Management, Billing, Compliance.

A contractor shall have up to 3 weeks after notification to appeal, challenge or otherwise dispute the scorecard results. After the 3-week period, the scorecard shall be considered final and accepted by the contractor.

A contractor receiving a 70% or less overall evaluation scorecard rating for services provided may be disqualified for bidding on any future services with the HCPSS for a period of three (3) years and/or for the remaining contract term including renewal options.

**Name of Contractor:** \_\_\_\_\_

**Name of Project:** \_\_\_\_\_ **Contract/Bid Number:** \_\_\_\_\_

**Reviewed by:** \_\_\_\_\_ **Department:** \_\_\_\_\_

Please take a moment to tell us about this contractor's performance. We will summarize all the information we obtain about each contractor and provide it to them. Supporting documentation shall be required to support any scores noted on the performance evaluation scorecard.

**HOW SATISFIED.** Please tell us **how satisfied** you are with the **performance** of the contractor named above. Circle a 10 if you are highly satisfied with their performance on a measure. Circle a 1 if you are highly dissatisfied with their performance on a measure. Circle a number in between to show different degrees of satisfaction. Circle N/A for any performance indicators that do not apply to the project. There are no right or wrong answers; just tell us how you feel.

**A contractor receiving a 70% or less overall evaluation scorecard rating for a project may be disqualified for bidding on any future projects with the HCPSS for a period of three (3) years and/or for the remaining contract term including renewal options. The contractor shall be notified of their performance status after each project.**

**Satisfaction** with the contractor's performance:

**Highly  
Dissatisfied**                      **Highly  
Satisfied**

- |                                                                                                                                         |                      |     |
|-----------------------------------------------------------------------------------------------------------------------------------------|----------------------|-----|
| 1. <b>Quality of Work.</b> The contractor's ability to do the job right the first time.                                                 | 1 2 3 4 5 6 7 8 9 10 | N/A |
| 2. <b>Responsiveness.</b> The contractor's ability to adapt to changes and meet unusual needs.                                          | 1 2 3 4 5 6 7 8 9 10 | N/A |
| 3. <b>Professionalism.</b> The courtesy and standards of conduct maintained by the contractor and his or her employees.                 | 1 2 3 4 5 6 7 8 9 10 | N/A |
| 4. <b>Resources.</b> The contractor's ability to provide his or her employees with the tools, parts, and supplies needed to do the job. | 1 2 3 4 5 6 7 8 9 10 | N/A |
| 5. <b>Schedule Management.</b> The contractor's ability to show up when scheduled and complete the work on time.                        | 1 2 3 4 5 6 7 8 9 10 | N/A |

6. <b>Quality Control.</b> The contractor's ability to identify problems and deficiencies before you do.	1 2 3 4 5 6 7 8 9 10	N/A
7. <b>Deficiency Resolution.</b> The contractor's ability to rapidly correct deficiencies in his or her work.	1 2 3 4 5 6 7 8 9 10	N/A
8. <b>Submittal Management.</b> The contractor's ability to provide submittals In a timely and efficient manner.	1 2 3 4 5 6 7 8 9 10	N/A
9. <b>Training.</b> The contractor's ability to provide employees well-trained in all aspects of their jobs.	1 2 3 4 5 6 7 8 9 10	N/A
10. <b>Appearance.</b> The contractor's ability to keep uniforms, tools, and vehicles clean so as to portray a positive image.	1 2 3 4 5 6 7 8 9 10	N/A
11. <b>Security.</b> The contractor's ability to safeguard your facilities and assets.	1 2 3 4 5 6 7 8 9 10	N/A

- |                                                                                                                                                                                                                  |                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| 12. <b>Safety.</b> The contractor's ability to keep the workplace safe and comply with OSHA requirements.<br>N/A                                                                                                 | 1 2 3 4 5 6 7 8 9 10 |
| 13. <b>Utility Conservation.</b> The contractor's ability to use only the water, gas, electricity, and air conditioning needed to do the job.<br>N/A                                                             | 1 2 3 4 5 6 7 8 9 10 |
| 14. <b>Disruptions.</b> The contractor's ability to keep interruptions to the operations of your firm or agency to a minimum.<br>N/A                                                                             | 1 2 3 4 5 6 7 8 9 10 |
| 16. <b>Quality of Materials.</b> The contractor's ability to use high quality parts and supplies.<br>N/A                                                                                                         | 1 2 3 4 5 6 7 8 9 10 |
| 17. <b>Emergency Response.</b> The contractor's ability to rapidly restore normal operations after an emergency, power outage, or severe weather.<br>N/A                                                         | 1 2 3 4 5 6 7 8 9 10 |
| 18. <b>Hazardous Materials.</b> The contractor's ability to properly handle hazardous materials.<br>N/A                                                                                                          | 1 2 3 4 5 6 7 8 9 10 |
| 19. <b>Innovation.</b> The contractor's ability to use new materials and adopt new methods to increase effectiveness.<br>N/A                                                                                     | 1 2 3 4 5 6 7 8 9 10 |
| 20. <b>Teamwork.</b> The contractor's ability to be a team player in order to assist in accomplishing the objectives of your firm or agency.<br>N/A                                                              | 1 2 3 4 5 6 7 8 9 10 |
| 21. <b>Cost Management.</b> The reasonableness of the contractor's costs, especially for contract changes.<br>N/A                                                                                                | 1 2 3 4 5 6 7 8 9 10 |
| 22. <b>Billing.</b> The contractor's ability to present correct and properly documented invoices.<br>N/A                                                                                                         | 1 2 3 4 5 6 7 8 9 10 |
| 23. <b>Compliance.</b> The contractor complied with all rules, requests, regulations And requirements. This includes compliance with instructions Regarding interactions with students, staff and others.<br>N/A | 1 2 3 4 5 6 7 8 9 10 |

**Please summarize the contractor's overall performance based on the scores for the performance indicators noted above:**

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**Please return the completed survey by email to: (identified HCPSS staff**

Thank you for your prompt assistance.