




## Memorandum from Purchasing Department

### *Letter of Instruction for RFP #251-24-403*

**To: Prospective Parties**

Thank you for your interest in the Wake County Public School System. Please review the following instructions prior to submitting your proposal.

- Prior to submitting and executing the proposal, please make sure you read and understand the terms and conditions referenced. All proposals are subject to the terms and conditions outlined herein. All responses will be controlled by such terms and conditions and the submission of other terms and conditions, price lists, catalogs, and/or other documents as part of an offeror's response will be waived and have no effect either on this Request For Proposals or on any contract that may be awarded resulting from this solicitation. The attachment of any other terms and conditions by the Offeror may be grounds for rejection of that proposal. Offeror specifically agrees to the conditions set forth in the above paragraph by signature to the proposal.
- Please read carefully the section titled **CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING THE RFP PROCESS**. All questions should be directed to [bids-pgooding@wcpss.net](mailto:bids-pgooding@wcpss.net).
- Offerors are cautioned that this is a request for offers, not a request to contract, and WCPSS reserves the unqualified right to reject any and all offers when such rejection is deemed to be in the best interest of WCPSS.
- In submitting a proposal, the Offeror agrees not to use the results there from as part of any news release or commercial advertising.
- **Submit one (1) signed, original executed proposal responses, one (1) photocopy, and one (1) electronic copy on a flash drive (emails not accepted) of your proposal simultaneously to the address identified below.**
- Clearly mark each package with: (1) Vendor name; (2) the RFP number; and (3) the due date. Address the package(s) for delivery as shown in the table below. If Vendor is submitting more than one (1) proposal, each proposal shall be submitted in separate envelopes and marked accordingly. For delivery purposes, separate envelopes from a single Vendor may be included in the same outer package. Proposals are subject to rejection unless submitted with the information above included on the outside of the proposal package.

 1551 Rock Quarry Rd – Bldg. F Raleigh, NC 27610	<b>Request for Proposal #251-24-403</b>	
	<b>EVALUATION OF TEACHER AND SCHOOL LEADER INCENTIVE PROGRAM</b>	
	Contract Type: Open Market	
Refer <b><u>ALL</u></b> Inquiries to: Petra Gooding Telephone No: 919-588-3456	<b>BIDS WILL BE PUBLICLY OPENED ON:</b> <b>APRIL 2, 2024, AT 2:00 pm</b>	
E-Mail: <a href="mailto:bids-pgooding@wcpss.net">bids-pgooding@wcpss.net</a>	Using Agency Name: WAKE COUNTY PUBLIC SCHOOL SYSTEM	

### **NOTICE TO VENDORS**

Sealed proposals, subject to the conditions made a part hereof, will be received at this office (1551 Rock Quarry Road, Building F, Raleigh, NC) until **2:00 p.m.** on the day of opening and then opened, for furnishing and delivering the commodity as described herein. Refer to page 2 for proper mailing instructions.

Proposals submitted via facsimile (FAX) machine or email in response to this Request for Proposal will not be acceptable. Proposals are subject to rejection unless submitted on this form.

### **EXECUTION**

In compliance with this Request for Proposal, and subject to all the conditions herein, the undersigned offers and agrees to furnish and deliver any or all items upon which prices are proposed, at the prices set opposite each item within the time specified herein. By executing this proposal, I certify that this proposal is submitted competitively and without collusion.

**Failure to execute/sign proposal prior to submittal shall render bid invalid. Late proposals are not acceptable.**

VENDOR:		FEDERAL ID OR SOCIAL SECURITY NO.	
STREET ADDRESS:		P.O. BOX:	ZIP:
CITY & STATE & ZIP:		TELEPHONE NUMBER:	TOLL FREE TEL. NO (800)
PRINCIPAL PLACE OF BUSINESS ADDRESS IF DIFFERENT FROM ABOVE			
TYPE OR PRINT NAME & TITLE OF PERSON SIGNING:		FAX NUMBER:	
AUTHORIZED SIGNATURE:	DATE:	E-MAIL:	

Offer valid for 60 days from date of proposal opening unless otherwise stated here: \_\_\_\_ days Prompt Payment  
Discount: \_\_\_\_\_ % \_\_\_\_\_ days.

Submit **one (1) signed, original executed** proposal response, and 1 electronic copy on a flash drive (emails will not be accepted) of your proposal simultaneously to the address identified below.

Clearly mark each package with: (1) Vendor name; (2) the RFP number; and (3) the due date. Address the package(s) for delivery as shown in the table above. If Vendor is submitting more than one (1) proposal, each proposal shall be submitted in separate envelopes and marked accordingly. For delivery purposes, separate envelopes from a single Vendor may be included in the same outer package. Proposals are subject to rejection unless submitted with the information above included on the outside of the proposal package.

**MAILING INSTRUCTIONS:** Mail only one fully executed proposal with copies, unless otherwise instructed, and only one proposal package with copies per envelope. **Address envelope and include proposal number as shown below.** It is the responsibility of the Vendor to have the proposal in this office by the specified time and date of opening.

<b><u>DELIVER TO:</u></b>
PROPOSAL NO. RFP 251-24-403  Wake County Public School System  Purchasing Department, Building F  1551 Rock Quarry Road  Raleigh NC 27610-4145

### **RFP SCHEDULE**

The table below shows the *intended* schedule for this RFP. WCPSS will make every effort to adhere to this schedule.

Event	Responsibility	Date and Time
Issue RFP	WCPSS	3-1-24
Submit written questions to <a href="mailto:bids-pgooding@wcpss.net">bids-pgooding@wcpss.net</a> (Reference RFP # in the subject line)	Vendor	3-8-24 by 2::00 pm ET
Provide Responses to Questions	WCPSS	3-15-24 by end-of-business
Submit Proposals	Vendor	4-2-24 @ 2:00 PM ET

### **PROPOSAL QUESTIONS**

Upon review of the RFP documents, Vendors may have questions to clarify or interpret the RFP in order to submit the best proposal possible. To accommodate the Proposal Questions process, Vendors shall submit any such questions, in written form by the above due date. WCPSS will not respond to questions via telephone or telephone message(s). Written questions must be emailed to [bids-pgooding@wcpss.net](mailto:bids-pgooding@wcpss.net) by the date and time specified above. Vendors should enter “RFP #251-24-403 Questions” as the subject for the email. Questions submittals should include a reference to the applicable RFP section and be submitted in a format shown below:

Reference	Vendor Question
RFP Section, Page Number	Vendor question ...?

Questions received prior to the submission deadline date, WCPSS’ response, and any additional terms deemed necessary by WCPSS will be posted in the form of an addendum to the Interactive Purchasing System (IPS), <http://www.ips.state.nc.us> and WCPSS Purchasing website <http://www.wcpss.net/domain/101>, and shall become an Addendum to this RFP. No information, instruction or advice provided orally or informally by any WCPSS personnel, whether made in response to a question or otherwise in connection with this RFP, shall be considered authoritative or binding. **Vendors shall rely *only* on written material contained in an Addendum to this RFP.**

## **PROPOSAL EVALUATION**

All proposals will be evaluated by representatives of WCPSS. WCPSS may, at its sole discretion, ask for additional information and/or elect to conduct interviews with finalists to clarify information provided in the proposals.

The services that are the subject of this RFQ/P are not required to be bid under North Carolina law, and none of the statutory requirements regarding public bidding apply to this RFQ/P. This document, and not those statutes, will govern the selection process.

WCPSS shall not be required to award the contract to the lowest proposed compensation; nor shall WCPSS have any obligation to explain its decision to recommend or not to recommend any particular vendor or to invite or exclude any particular vendor from consideration at any stage of the process. Instead of recommending that contracts be awarded to one or more vendors who presented proposals, WCPSS may, at its sole discretion, reject the proposals and repeat the process, enter into direct contract negotiations with one or more vendors (possibly including vendors who have not previously submitted proposals) or take any other action WCPSS deems advisable under all the circumstances.

WCPSS is expected to make any final selection(s) based upon any factors or considerations WCPSS deems relevant. Factors often considered include qualifications, relevant experience, fee, and ability to perform work in a timely manner. WCPSS retains sole discretion to award the contract to the vendor(s) it believes will best serve the interests of WCPSS and may consider any factors, documents, or information it deems relevant in making that determination. WCPSS shall not have any obligation to explain its decision to select or not select any individual vendors or to invite or exclude any individual vendors from consideration at any stage of the process. The decision of WCPSS to accept or reject any proposals and to award contract(s) to any one or more vendor(s) shall be final and not subject to further review.

Vendors are subject to *immediate disqualification* at any stage of the selection process for any of the following:

- The submission of false or misleading information in the vendor's proposal.
- Any efforts to dissuade or discourage other vendors from submitting proposals.
- Any efforts to influence, dictate, or change the terms of another vendor's proposal.
- Any form of bid collusion or bid rigging.

## **METHOD OF AWARD**

All qualified proposals will be evaluated, and awards will be made to the Vendor(s) meeting the RFP requirements and achieving the highest and best final evaluation which is best for WCPSS. Vendors **SHALL not be considered** who are not approved or authorized by The State of North Carolina to do business with The State of North Carolina. WCPSS reserves the right to waive any minor informality or technicality in proposals received.

### **IMPORTANT: CONFIDENTIALITY AND PROHIBITED COMMUNICATIONS DURING EVALUATION**

***During the evaluation period***—from the date proposals are opened through the date the contract is awarded—each Vendor submitting a proposal (including its representatives, sub-contractors and/or suppliers) is prohibited from having any communications with any person inside or outside of WCPSS regarding this solicitation. All communication should be directed in written form to the WCPSS contact indicated on pages 1, 2, and 3.

## **BACKGROUND: CONTEXT AND AWARD**

The Wake County Public School System (WCPSS) is the largest school system in North Carolina and the 15th largest district in the nation. WCPSS covers twelve municipalities, 864 square miles, and is comprised of 198 schools, including 119 elementary, 38 middle, 31 high, seven alternative schools, one K-8 academy, and two leadership academies for grades 6-12. Wake County is the most populous county in the state (growing by 62 people/day) with an estimated population of 1,175,021 (U.S. Census Quick Facts, 2022). Raleigh (the largest city in Wake) is the county seat and the state capital. WCPSS is centrally located to Research Triangle Park (RTP), the world's largest research park and collaborative innovation center, and a combination of colleges and research universities (University of North Carolina-Chapel Hill, North Carolina State University, Duke University, North Carolina Central University, St. Augustine's University, Shaw University, William Peace University, and Meredith College). U.S. tech giants (e.g., Meta, Amazon, Google, and SAS Institute) identify the Triangle area (Raleigh, Durham, and Chapel Hill) as a hub for talent and future growth (Eanes, 2022).

WCPSS employs approximately 20,096 personnel, including 10,985 teachers. For 16 years, the district has consistently ranked among the nation's highest number of National Board-certified teachers (NBCTs). More than 3,000 teachers have achieved this milestone while working at WCPSS. WCPSS also enrolls over 158,000 students from diverse cultural and socioeconomic backgrounds. See the [WCPSS District Facts](#) page for current and historical information on schools and students. A large number of schools in the district are consistently low-performing and serve large shares of economically disadvantaged students.

Fortunately, [the Teacher and School Leader \(TSL\) Incentive Program](#), operated by the U.S. Department of Education, gives WCPSS a unique opportunity to implement innovative human capital management and performance-based compensation reforms that are designed to ensure that students enrolled in these schools have access to high-quality educational opportunities. WCPSS will implement Project LEADERS (*Leveraging Employee Advancement to Develop Excellence and Reach Success*) to enhance its human capital management system (HCMS) and implement a performance-based compensation system (PBCS) to recruit, retain, reward and develop well-qualified educators at high-need schools and to ensure students have equitable access to educational resources and opportunities. This project aligns with the goals of the TSL Incentive Program and key elements of the U.S. Department of Education's *Raise the Bar: Lead the World Call to Action*, the [WCPSS Strategic Plan](#), [Equity Policy 1150](#), Retention and Recruitment Core Team Framework, and other state initiatives (e.g., the [DRIVE Task Force](#)).

### ***Stakeholder Support for Project LEADERS***

To solicit support and buy-in for Project LEADERS, WCPSS leadership and the Project LEADERS team collaborated with teachers, principals, school leaders, researchers, and other key stakeholders. During a recent listening session (June 2023), teachers provided input for performance-based compensation and incentives in the context of the TSL grant competition. An overall theme emerged: ***“teachers want to be respected and compensated”*** and ***“they want to be valued.”*** One teacher believed her ***“school was set up to fail”*** because of its lack of educational resources for its large population of economically disadvantaged Black and Hispanic students and low student academic achievement. An assistant principal discussed that a new ***beginning teacher at her school could not afford the high cost of living in the Raleigh area*** and relocated to another school district.

In preparation for this grant opportunity, principals, various stakeholders including our Chief of Schools, area superintendents, assistant superintendents, external consultants, and other central office staff attended planning meetings and participated in discussions to provide their feedback and suggestions to design an ***effective, evidence-based, and sustainable*** PBCS for teachers, instructional assistants, and school leaders. Stakeholder input from educators, the public, and school leaders was vital in designing a PBCS with incentives and advanced leadership roles that provide “teachers new roles with additional pay and responsibilities, career advancement opportunities believed to encourage retention” (Cresap & Paget Inc., 1984).

### ***Implementation and Evaluation of a Performance-Based Compensation System (PBCS)***

Based on the feedback from educators and school leaders, WCPSS will develop and implement PBCS in 24 targeted high-

need schools by providing the following three interventions:

- Performance-based compensation to well-qualified teachers and school leaders who meet or exceed growth in high-need schools to close the achievement gap for low-performing students.
- Incentives (i.e., salary differentials) to attract and retain highly qualified teachers and school leaders.
- Robust support for professional growth and career pathways (advanced teacher roles/career ladders) for teachers to expand their leadership and increase classroom effectiveness.

All elementary and middle schools in WCPSS were considered eligible for Project LEADERS if 50% or more of their students qualified for free and reduced-price lunch, they carried a D or F school performance grade, and they met one (or more) of the following conditions:

- Have a C, D, or F school performance grade (in North Carolina, school performance grades are based on a A-F letter system and are assigned using a weighted model of the school proficiency score (80%) and the school growth score (20%) combined) and
  - a. A school growth index score below 0.75 or
  - b. Under-represented minority students comprise 60% or more of the student body; two-year average teacher turnover is greater than 20%, and fewer than half of the students met basic grade level performance standards or
  - c. Free and reduced-price lunch status students comprise 60% or more of the student population and the school growth index is average or below average or
  - d. Located in one of the 10 district-identified high-priority school feeder patterns or
  - e. Has been identified by the North Carolina Department of Public Instruction as a Restart Model school.

Of the 198 schools within the district, a subset of high-need schools was identified that have 50% or more of their students qualifying for free or reduced lunch that ranges from **59% - 81.6%** (average of 70%). On average, 62% of students that attend the high-need schools are economically disadvantaged (range of 51.1% – 73.6%). Out of the subset of high-need schools, 24 schools will participate in Project LEADERS.

### ***Components of the PBCS***

The following section defines Project LEADERS' critical PBCS design features. Under Project LEADERS, educators will be eligible for the following recruitment and retention incentives:

**Table 4: Project LEADERS Incentives**

Who	Performance Base Compensation	Salary Differential (Recruitment & Retention)	Career Advancement/ Tuition Assistance
<b>Teachers</b>	\$2000 when meeting growth goals: Year 1: 13% Year 2: 15% Year 3: 18%	\$3,000	Up to \$5,000/year  <b>New Teacher (including Alternative Licensure &amp; Participate Learning Ambassador Teachers:</b> Reimbursement for continuing education through CCTI-Wake Durham toward teaching license, up to \$2,000 and \$500 state licensure exam costs  NCBT application fees up to \$1,900  <b>Experienced Teacher:</b> Tuition reimbursement at university partner school (up to \$5,000) for advanced degrees  <b>Teacher Leader/School Leader:</b>
			Tuition reimbursement at university partner school up to \$5,000 for advanced degrees. NCBT application fees up to \$1,900; state/national professional educator memberships up to \$500
<b>Para-professionals (IAs)</b>	\$2000 when meeting growth goals: Year 1: 13% Year 2: 15% Year 3: 18%	\$3,000	Up to \$2,500/year reimbursement for continuing education through CCTI-Wake Durham toward teaching license, up to \$2,000 and \$500 state licensure exam costs
<b>Principals</b>	\$2,000 when school meets growth goals: Year 1: 13% Year 2: 15% Year 3: 18%	\$5,000	Tuition reimbursement at university partner school up to \$5,000 for advanced degrees.
<b>Asst. Principals</b>	\$2,000 when school meets growth goals: Year 1: 13% Year 2: 15% Year 3: 18%	\$3,000	Tuition reimbursement at university partner school up to \$5,000 for advanced degrees.

While the PBCS's design and implementation stage will allow for possible revisions based on stakeholder feedback and design analytics, the program's core parameters will consist of (a) incentive structures; (b) performance measures; (c) performance standards and thresholds; (d) size of incentives; and (e) and frequency of payouts.

A growing literature in personnel economics suggests that incentives are most effective when the unit under observation is awarded with immediacy between action and reward. Most incentive programs in the education sector distribute awards annually, corresponding to the academic year, often due to the timing of results from end-of-year assessments, which in North Carolina can often take until late fall or winter of the following school year, thus weakening the incentive effect. Given that the calculation of performance measures is notoriously slow, WCPSS anticipates working with the external evaluator to explore if data from the state's teacher evaluation system can be accessed earlier so that summative educator and school-level performance measures, and overall outcomes, are produced on a timeline substantially faster than current practices.

## **SCOPE OF WORK AND KEY DELIVERABLES**

To evaluate the impact of Project LEADERS, WCPSS seeks to contract with an external evaluator to design and deploy a program evaluation with both formative and summative feedback loops to rigorously measure and report on project implementation and impact.

Please refer to Appendix A for the PBCS logic model. Please see Appendix B for TSL performance measures.

Preliminary evaluation questions WCPSS seeks to have addressed by the evaluator are below. Recommended modifications to the evaluation questions by the evaluator will be considered, if applicable:

- What is the impact of **performance-based compensation** in the 24 schools with respect to recruitment, retention, and educator quality? To what extent is there heterogeneity by educator and school characteristics?
- What is the impact of **salary differentials** for educators in the 24 schools with respect to recruitment, retention, and educator quality? To what extent is there heterogeneity by student, educator, and school characteristics?
- What is the impact of **support for professional growth and career pathways** in the 24 schools with respect to recruitment, retention, and educator quality? To what extent is there heterogeneity by educator and school characteristics?
- What is the fidelity of implementation of the three components of Project LEADERS? To what extent does fidelity vary across schools, and are certain educator or school characteristics associated with greater fidelity?

The evaluator will be responsible for providing a suite of final products to disseminate major findings from the project. WCPSS is open to a recommended approach from the evaluator regarding presentation and sense-making of results to inform program and policy recommendations. At minimum, WCPSS will expect the following:

- Technical Report – Final summative report that provides a comprehensive overview of methods, findings, and includes conclusions/recommendations.
- Community-Facing Briefs – Brief, accessible summary of evaluation findings designed to communicate results to a non-technical audiences, including the general public, as well as policymakers and practitioners.
- Summary Presentation – The vendor will summarize the main findings and conclusion from the technical report in a PowerPoint format and present results in 3-4 presentations to key stakeholder groups.

WCPSS also expects the evaluator to submit annual budget reports. The budget ceiling is \$494,293.

### ***Proposal Requirements***

WCPSS would like to ensure that it holds all applicants to the same proposal requirements. To that end, WCPSS will require each applicant to follow guidelines similar to those used in large grant competitions (e.g., the U.S. Department of Education's Institute of Education Sciences). In particular, the applicant must include in their submission a Project Narrative consisting of four sections: (i) Literature Review, (ii) Research Plan, (iii) Proposed Budget, and (iv) Personnel. Below are additional parameters for each section plus page limits noted in brackets.

#### ***(i) Literature Review [3 pages]***

In this section, the applicant should demonstrate deep knowledge of performance-based compensation models like those that will be implemented in WCPSS as part of this project.

#### ***(ii) Research Plan [10 pages]***

This section should describe the methods and data analysis plan. It should also include a project timeline and describe dissemination plans for both public- and internal-facing (i.e., district) audiences.

#### ***(iii) Proposed Budget [No Limit]***



This section should include a proposed budget and budget justification by year, with specific line items such as salaries/benefits, software, equipment, travel, etc.

*(iv) Personnel [No Limit]*

This section should demonstrate that the vendor is capable of performing the work. In particular, this section should include biographical information on all key project personnel (including subcontractors, if any). Each team member should include a CV and a biosketch no longer than 200 words.

While sections (iii) and (iv) have no page limits, the Narrative should not exceed 20 pages in total. Appendices do not count toward the total page count. Please refer to Appendix C for general formatting guidelines. The applicant should include a completed bid cover sheet (Attachment 1).

In addition, the applicant must include (i) at least two samples of work conducted by members of the proposed project team and that are related to the scope of this project; and (ii) professional references regarding prior projects they have completed that are relevant to the scope of this project. These work samples and references do not count toward the page limit.

## ***Selection Process***

WCPSS will evaluate proposals based on the criteria below:

- Team Composition and Competencies [20 points]
- Proposed Evaluation Approach [40 points]
- Stakeholder Engagement and Reporting [15 points]
- Cost Proposal [10 points]
- Prior Work Samples [15 points]

## ***Limitations***

This RFP does not commit WCPSS to award any contract or pay for the preparation of any proposal submitted in response to this RFP. WCPSS may withdraw or amend this RFP in its entirety or in part, at any time if it is in the best interests of the organization to do so.

## ***References***

Eanes, Z. (2022, June 8). Meta could join tech giants' growth in the Triangle. Axios.

<https://www.axios.com/local/raleigh/2022/06/08/meta-possible-expansion-raleigh-north-carolina>

## **COST PROPOSAL**

The bid shall be inclusive of all expenses. Vendor shall submit their price proposal on their own form and in their own format. Vendor shall attach their cost proposal as the final page of their submission. The bid price shall be provided as an overall cost for the services, including breakdowns for the proposed structure and deliverables listed above.

## **QUALIFICATIONS**

- **VENDOR shall be licensed and approved to do business in the State of North Carolina.**
- Insurance requirements referenced within as well as any Federal, State and Local requirements shall be required and maintained.
- Demonstrated experience in performing similar projects.
- Vendor will be disqualified for consideration if they are listed on either the State of North Carolina debarred vendor registry, or the Federal Government debarred vendor registry.

(Federal Government)

<https://www.sam.gov/SAM/pages/public/searchRecords/searchResults.jsf>

(State of North Carolina)

<https://ncadmin.nc.gov/documents/nc-debarred-vendors>

## **REQUIRED SUBMITTALS**

- Signed, original execution page (page 2)
- Completed attachments D & E
- Relevant experience and project methodology
- Cost proposal

## **TERMS AND CONDITIONS**

1. **READ, REVIEW AND COMPLY:** It shall be the bidder's responsibility to read this entire document, review all enclosures and attachments, and comply with all requirements specified herein.
2. **NOTICE TO BIDDERS:** All bids are subject to the provisions of special terms and conditions specific to this Invitation for Bids, the specifications. Wake County Public School System (WCPSS) objects to and will not evaluate or consider any additional terms and conditions submitted with a bidder response. This applies to any language appearing in or attached to the document as part of the bidder's response. **DO NOT ATTACH ANY ADDITIONAL TERMS AND CONDITIONS.**  
By execution and delivery of this document, the bidder agrees that any additional terms and conditions, whether submitted purposely or inadvertently, shall have no force or effect.
3. **DEFINITIONS:**
  - **BIDDER:** Company, firm, corporation, partnership, individual, etc., submitting a response to an Invitation for Bids.
  - **TERM CONTRACT:** A contract generally intended to cover all normal requirements for a commodity for a specified period of time based on estimated quantities only.
  - **OPEN MARKET CONTRACT:** A contract for the purchase of a commodity not covered by a term contract.
4. **EXECUTION:** Failure to sign under EXECUTION section will render bid invalid.
5. **ORDER OF PRECEDENCE:** In cases of conflict between specific provisions in this bid, the order of precedence shall be (1) special terms and conditions specific to this bid, (2) specifications, and (3) Instructions to Bidders.
6. **TIME FOR CONSIDERATION:** Unless otherwise indicated on the first page of this document, bidder's offer shall be valid for 45 days from the date of bid opening. Preference may be given to bids allowing not less than 45 days for consideration and acceptance.
7. **SPECIFICATIONS:** Any deviation from specifications indicated herein must be clearly pointed out; otherwise, it will be considered that items offered are in strict compliance with these specifications, and bidder will be held responsible, therefore. Deviations shall be explained in detail. **The bidder shall not construe this paragraph as inviting deviation or implying that any deviation will be acceptable.**
8. **INFORMATION AND DESCRIPTIVE LITERATURE:** Bidder is to furnish all information requested and, in the spaces, provided in this document. Further, if required elsewhere in this bid, each bidder must submit with their bid sketches, descriptive literature and/or complete specifications covering the products offered. Reference to literature submitted with a previous bid will not satisfy this provision. Bids which do not comply with these requirements will be subject to rejection.
9. **RECYCLING AND SOURCE REDUCTION:** It is the policy of WCPSS to encourage and promote the purchase of products with recycled content to the extent economically practicable, and to purchase items which are reusable, refillable, repairable, more durable, and less toxic to the extent that the purchase or use is practicable and cost-effective.  
We also encourage and promote using minimal packaging and the use of recycled/recyclable products in the packaging of commodities purchased. However, no sacrifice in quality of packaging will be acceptable. The company remains responsible for providing packaging that will protect the commodity and contain it for its intended use.  
Companies are strongly urged to bring to the attention of WCPSS which issued the solicitation document, those products or packaging they offer which have recycled content and that are recyclable.
10. **CLARIFICATIONS/INTERPRETATIONS:** Any and all questions regarding this document must be addressed to the purchaser named on the cover sheet of this document. Do not contact the school or department directly. Any and all revisions to this document shall be made only by written addendum from WCPSS Purchasing Department. The bidder is cautioned that the requirements of this bid can be altered only by written addendum and that verbal communications from whatever source are of no effect.
11. **ACCEPTANCE AND REJECTION:** WCPSS reserves the right to reject any and all bids, to waive any informality in bids and, unless otherwise specified by the bidder, to accept any item in the bid. If either a unit price or extended price is obviously in error and the other is obviously correct, the incorrect price will be disregarded.
12. **REFERENCES:** WCPSS reserves the right to require a list of users of the exact item offered. WCPSS may contact these users to determine acceptability of the bid. Such information may be considered in the evaluation of the bid.
13. **AWARD OF CONTRACT:** As directed by statute, qualified bids will be evaluated and acceptance may be made of the lowest and best bid most advantageous to WCPSS as determined upon consideration of such factors as: prices offered; the quality of the articles offered; the general reputation and performance capabilities of the bidders; the substantial conformity with the specifications and other conditions set forth in the bid; the suitability of the articles for the intended use; the related services needed; the date or dates of delivery and performance; and such other factors deemed by WCPSS to be pertinent or peculiar to the purchase in question. Unless otherwise specified by WCPSS or the bidder, WCPSS reserves the right to accept any item or group of items on a multi-item bid. WCPSS also reserves the right to reject any and all bids. In addition, on TERM CONTRACTS, WCPSS reserves the right to make partial, progressive, or multiple awards: where it is advantageous to award separately by items; or where more than one supplier is needed to provide the contemplated requirements as to quantity, quality, delivery, service, geographical areas; other factors deemed by WCPSS to be pertinent or peculiar to the purchase in question.
14. **HISTORICALLY UNDERUTILIZED BUSINESSES:** Pursuant to General Statute 143-48 and Executive Order #150, WCPSS invites and encourages participation in this procurement process by businesses owned by minorities, women, disabled, disabled business enterprises and non-profit work centers for the blind and severely disabled.

15. **CONFIDENTIAL INFORMATION:** As provided by statute and rule, WCPSS will consider keeping trade secrets which the bidder does not wish disclosed confidential. Each page shall be identified in boldface at the top and bottom as "CONFIDENTIAL" by the bidder. Cost information shall not be deemed confidential. In spite of what is labeled as a trade secret, the determination whether it is or not will be determined by North Carolina law.
16. **SAMPLES:** Sample of items, when required, must be furnished as stipulated herein, free of expense, and if not destroyed will, upon request be returned at the bidder's expense. Request for the return of samples must be made within 10 days following date of bid opening. Otherwise, the samples will become WCPSS property. Each individual sample must be labeled with the bidder's name, bid number, and item number. A sample on which an award is made, will be retained until the contract is completed, and then returned, if requested, as specified above.
17. **AWARD PROCEDURES:** Contract award notice shall be posted on WCPSS website. Contract award notices are sent **only** to those actually awarded contracts, and not to every person or firm responding to this solicitation.
18. **RECIPROCAL PREFERENCE:** G.S. 143-59 establishes a reciprocal preference law to discourage other states from applying in-state preferences against North Carolina's resident bidders. The "Principal Place of Business" is defined as the principal place from which the trade or business of the bidder is directed or managed.
19. **DEFAULT AND PERFORMANCE BOND:** In case of default by the contractor, WCPSS may procure the articles or services from other sources and hold the contractor responsible for any excess cost occasioned thereby. WCPSS reserves the right to require performance bond or other acceptable alternative guarantees from successful bidder without expense to WCPSS.
20. **GOVERNMENTAL RESTRICTIONS:** In the event any Governmental restrictions are imposed which necessitate alteration of the material, quality, workmanship, or performance of the items offered prior to their delivery, it shall be the responsibility of the contractor to notify in writing WCPSS, indicating the specific regulation which required such alterations. WCPSS reserves the right to accept any such alterations, including any price adjustments occasioned thereby, or to cancel the contract.
21. **TAXES:** Any applicable taxes shall be invoiced as a separate item.  
G.S. 143-59.1 bars the WCPSS from entering into contracts with vendors if the vendor or its affiliates meet one of the conditions of G. S. 105-164.8(b) and refuse to collect use tax on sales of tangible personal property to purchasers in North Carolina. Conditions under G. S. 105-164.8(b) include: (1) Maintenance of a retail establishment or office, (2) Presence of representatives in the State that solicit sales or transact business on behalf of the vendor and (3) Systematic exploitation of the market by media-assisted, media-facilitated, or media-solicited means. By execution of the bid document the vendor certifies that it and all of its affiliates (if it has affiliates) collect(s) the appropriate taxes.
22. **SITUS:** The place of this contract, its situs and forum, shall be Wake County, North Carolina, where all matters, whether sounding in contract or tort, relating to its validity, construction, interpretation, and enforcement shall be determined.
23. **GOVERNING LAWS:** This contract is made under and shall be governed and construed in accordance with the laws of the State of North Carolina.
24. **INSPECTION AT CONTRACTOR'S SITE:** WCPSS reserves the right to inspect, at a reasonable time, the equipment/item, plant or other facilities of a prospective contractor prior to contract award, and during the contract term as necessary for WCPSS determination that such equipment/item, plant or other facilities conform with the specifications/requirements and are adequate and suitable for the proper and effective performance of the contract.
25. **PAYMENT TERMS:** Payment terms are Net not later than 30 days after receipt of correct invoice or acceptance of goods, whichever is later. Payment may be made by procurement card, and it shall be accepted by the contractor for payment if the contractor accepts that card (Visa, MasterCard, etc.) from other customers.
26. **CONDITION AND PACKAGING:** Unless otherwise provided by special terms and conditions or specifications, it is understood and agreed that any item offered or shipped has not been sold or used for any purpose and shall be in first class condition. All containers/packaging shall be suitable for handling, storage, or shipment.
27. **STANDARDS:** All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization; such as the American Society of Mechanical Engineers for pressure vessels; the Underwriters Laboratories and /or National Electrical Manufacturers' Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type of device offered and furnished. Further, all items furnished shall meet all requirements of the Occupational Safety and Health Act (OSHA), and state and federal requirements relating to clean air and water pollution.
28. **PATENT:** The contractor shall hold and save WCPSS, its officers, agents, and employees, harmless from liability of any kind, including costs and expenses, on account of any confidential information, copyrighted material, patented or unpatented invention, articles, device or appliance manufactured or used in the performance of this contract, including use by WCPSS or disclosure of any information pursuant to the NC Public Records Act.
29. **ASSIGNMENT:** No assignment of the contractor's obligations nor the contractor's right to receive payment hereunder shall be permitted. However, upon written request approved by the purchasing department and solely as a convenience to the contractor, WCPSS may:
  - a. Forward the contractor's payment check directly to any person or entity designated by the contractor, and
  - b. Include any person or entity designated by contractor as a joint payee on the contractor's payment check.In no event shall such approval and action obligate WCPSS to anyone other than the contractor and the contractor shall remain responsible for fulfillment of all contract obligations.
30. **INSURANCE:**

- a. **Commercial General Liability:** The Vendor shall procure insurance coverage for direct operations, contractual liability and completed operations with limits not less than those stated below:

	Occurrence:
General Aggregate	\$2,000,000
Premises Operations	\$1,000,000
Personal & Advertising Injury	\$1,000,000
Medical Expense (any one person)	\$5,000
- b. **Comprehensive Automobile Liability Insurance**, including coverage for owned, hired, and non-owned vehicles: A Combined Single Limit for bodily injury and property damage limit of not less than \$2,000,000; and \$2,000 medical payments.
- c. **Worker's Compensation** including Occupational Disease and Employer's Liability Insurance.

Part A: Worker's Compensation Coverage – Statutory Limits as required by state of North Carolina Worker's Compensation laws.

Part B: Employer's Liability:

Bodily Injury by Accident: \$500,000 each accident

Bodily Injury by Disease: \$500,000 each employee

Bodily Injury by Disease: \$500,000 Policy Limit
- d. **Professional Liability Insurance (PL)/Errors and Omissions (E&O)** – Required for any services involving professional services such as architectural and or engineering services. May include malpractice insurance if medical or mental health services are provided. Minimum Limit requirements \$1,000,000
- e. **Sexual Misconduct Insurance (SML)/Sexual Abuse/Molestation** - Required for any provider services when alone with students. Covers allegations of sexual abuse by policyholder and those employed by them, whether founded or unfounded. Minimum Limit requirements 1,000,000.
- f. **Cyber Liability:** Required for any activity involving personal identifiable information or software applications. Minimum Limit requirements \$1,000,000 up to \$5,000,000.
- g. Other types of appropriate insurance may be required depending upon scope of services provided. Examples are aviation liability, pollution liability, crime, employee dishonesty/directors and officers.
- h. **Certificates of Insurance** acceptable to WCPSS shall be filed with WCPSS prior to commencement of the Work. These Certificates shall contain a provision that coverage afforded under the policies will not be canceled until at least thirty (30) days' prior written notice has been given to WCPSS, and that the Wake County Board of Education is listed as additional insured on general liability and automobile liability.

The successful vendor agrees to hold harmless and indemnify the Wake County Board of Education (WCBOE) for any liability that may arise from the negligent or illegal acts of the vendor's employees or agents.

31. **GENERAL INDEMNITY:** The provider shall hold and save WCPSS, its officers, agents, and employees, harmless from liability of any kind, including all claims and losses, accruing or resulting to any other person, firm, or corporation furnishing or supplying work, services, materials, or supplies in connection with the performance of this contract, and from any and all claims and losses accruing or resulting to any person, firm, or corporation that may be injured or damaged by the provider in the performance of this contract and that are attributable to the negligence or intentionally tortious acts of the provider. The provider represents and warrants that it shall make no claim of any kind or nature against WCPSS agents who are involved in the delivery or processing of contractor goods to WCPSS. The representation and warranty in the preceding sentence shall survive the termination or expiration of this contract.
32. **CANCELLATION (TERM CONTRACTS ONLY):** All contract obligations shall prevail for at least 180 days after the effective date of the contract. After that period, in addition to the provisions of the paragraph entitled Price Adjustments, for the protection of both parties, this contract may be canceled in whole or in part by either party by giving 30 days prior notice in writing to the other party.
33. **QUANTITIES (TERM CONTRACTS ONLY):** The award of a term contract neither implies nor guarantees any minimum or maximum purchases there under.
34. **PRICE ADJUSTMENTS (TERM CONTRACTS ONLY):** Any price changes, downward or upward, which might be permitted during the contract period must be general, either by reason of market change or on the part of the contractor to other customers.
  - a. **Notification:** Must be given to WCPSS, in writing, concerning any proposed price adjustments. Such notification shall be accompanied by copy of manufacturer's official notice or other acceptable evidence that the change is general in nature.
  - b. **Decreases:** WCPSS shall receive full proportionate benefit immediately at any time during the contract period. **Increases:** All prices shall be firm against any increase for 180 days from the effective date of the contract. After this period, a request for increase may be submitted with WCPSS reserving the right to accept or reject the increase or cancel the contract. Such action by WCPSS shall occur not later than 15 days after the receipt by WCPSS of a properly documented request for price increase. Any increases accepted shall become effective not later than 30 days after the expiration of the original 15 days reserved to evaluate the request for increase.
35. **Invoices:** It is understood and agreed that orders will be shipped at the established contract prices in effect on dates orders are placed. Invoicing at variance with this provision will subject the contract to cancellation. Applicable North Carolina sales tax shall be invoiced as a separate item.

36. **LUNSFORD ACT/CRIMINAL BACKGROUND CHECKS:** The Provider shall conduct at its own expense sexual offender registry checks on each of its employees, agents, ownership personnel, or contractors (“contractual personnel”) who will engage in any service on or delivery of goods to school system property or at a school-system sponsored event. The checks shall include at a minimum check of the State Sex Offender and Public Protection Registration Program, the State Sexually Violent Predator Registration Program, and the National Sex Offender Registry (“the Registries”). For the Provider’s convenience only, all of the required registry checks may be completed at no cost by accessing the North Carolina Sex Offender Registry website at <http://sexoffender.ncdoj.gov/>. The Provider shall provide certification on Sexual Offender Registry Check Certification Form that the registry checks were conducted on each of its contractual personnel providing services or delivering goods under this Agreement prior to the commencement of such services or the delivery of such goods. The Provider shall conduct a current initial check of the registries (a check done more than 30 days prior to the date of this Agreement shall not satisfy this contractual obligation). In addition, Provider agrees to conduct the registry checks and provide a supplemental certification form before any additional contractual personnel are used to deliver goods or provide services pursuant to this Agreement. Provider further agrees to conduct annual registry checks of all contractual personnel and provide annual certifications at each anniversary date of this Agreement. Provider shall not assign any individual to deliver goods or provide services pursuant to this Agreement if said individual appears on any of the listed registries. Provider agrees that it will maintain all records and documents necessary to demonstrate that it has conducted a thorough check of the registries as to each contractual personnel and agrees to provide such records and documents to the school system upon request. Provider specifically acknowledges that the school system retains the right to audit these records to ensure compliance with this section at any time in the school system’s sole discretion. Failure to comply with the terms of this provision shall be grounds for immediate termination of the Agreement. In addition, the school system may conduct additional criminal records checks at Provider’s expense. If the school system exercises this right to conduct additional criminal records checks, Provider agrees to provide within seven (7) days of request the full name, date of birth, state of residency for the past ten years, and any additional information requested by the school system for all contractual personnel who may deliver goods or perform services under this Agreement. Provider further agrees that it has an ongoing obligation to provide the school system with the name of any new contractual personnel who may deliver goods or provide services under the Agreement. WCPSS reserves the right to prohibit any contractual personnel of Provider from delivering goods or providing services under this Agreement if WCPSS determines, in its sole discretion, that such contractual personnel may pose a threat to the safety or well-being of students, school personnel or others.
37. **ACCESS TO PERSONS AND RECORDS:** The State Auditor and the WCPSS internal auditors shall have access to persons and records as a result of all contracts or grants entered into by WCPSS in accordance with General Statute 147-64.7 and Session Law 2010-194, Section 21 (i.e., the State Auditors and WCPSS may audit the records of the contractor during the term of the contract to verify accounts and data affecting fees or performance).
38. **COMPLIANCE WITH E-VERIFY:** Provider shall comply with all applicable laws and regulations in providing services under this Contract. In particular, Provider shall not employ any individuals to provide services to the School System who are not authorized by federal law to work in the United States. Provider represents and warrants that it is aware of and in compliance with the Immigration Reform and Control Act and North Carolina law (Article 2 of Chapter 64 of the North Carolina General Statutes) requiring use of the E-Verify system for employers who employ twenty-five (25) or more employees and that it is and will remain in compliance with these laws at all times while providing services pursuant to this Contract. Provider shall also ensure that any of its subcontractors (of any tier) will remain in compliance with these laws at all times while providing subcontracted services in connection with this Contract.
39. **COMPLIANCE WITH AFFORDABLE CARE ACT:** Provider is responsible for providing affordable health care coverage to all of its full-time employees providing services to the School System. The definitions of “affordable coverage” and “full-time employee” are governed by the Affordable Care Act and accompanying IRS and Treasury Department regulations.
40. **RESTRICTED COMPANIES LIST:** Bidder represents that as of the date of this bid, Bidder is not included on the Final Divestment List created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. § 147-86.58. Bidder also represents that as of the date of this bid, Bidder is not included on the list of restricted companies determined to be engaged in a boycott of Israel created by the North Carolina State Treasurer pursuant to N.C. Gen. Stat. § 147-86.81.
41. **BUSINESS AUTHORIZATION:** Bidder is duly qualified to do business in North Carolina. If Bidder is a business entity that is not registered in North Carolina, prior to providing any products or beginning any services described by this bid, Bidder shall either (i) obtain a certificate of authority from the Secretary of State for North Carolina, pursuant to N. C. Gen. Stat. § 55-15-03, or (ii) provide a letter from an attorney indicating that the attorney has reviewed N. C. Gen. Stat. § 55-15-01 and determined that Bidder is not required to obtain a certificate of authority pursuant to N. C. Gen. Stat. § 55-15-01(b).

## **ETHICS AND THE PURCHASING FUNCTION *Policy Code: 6401/9100***

The Wake County Board of Education is committed to conducting the purchasing function in an ethical manner and in compliance with state and federal laws and regulations. The Board expects all employees who are directly or indirectly involved in any aspect of the purchasing function to be aware of and comply with all current state and federal laws and regulations as these standards apply to the school system's purchasing activities. The Board's purchasing goals and principles will not be compromised by individuals motivated by personal gain.

Employees directly or indirectly involved in any aspect of the school system's procurement, purchasing, and/or contracting process for apparatus, materials, equipment, supplies, services, real property, or construction or repair projects, regardless of source of funds, must adhere to the following standards of conduct and those established in any policies regarding employee conflict of interest and 8305: Federal Grant Administration.

1. Employees are expected to make all purchasing-related decisions in a neutral and objective way based on what is in the best interest of the school system and not in consideration of actual or potential personal benefit.
2. Employees shall not participate, directly or indirectly, in making or administering any contract from which they will obtain a direct benefit, unless an exception is allowed pursuant to law.

An employee obtains a direct benefit when the employee or his or her spouse will receive income, commission, or property under the contract, or the employee or spouse has more than a 10 percent interest in an entity that is a party to the contract. See G.S. 14-234 and any policies regarding employee conflict of interest.

Participation in making or administering a contract includes, but is not limited to, participating in the development of specifications or contract terms; obtaining or reviewing bids; preparation or award of the contract; and having the authority to make decisions about, interpret, or oversee the contract.

3. Employees shall not participate, directly or indirectly, in the selection, award, or administration of a contract supported in whole or part by a federal grant or award if the employee has a real or apparent conflict of interest. See 2 C.F.R. 200.318 and policy 8305: Federal Grant Administration.

A real or apparent conflict exists when the employee, his or her immediate family member or partner, or an organization which employs or is about to employ any of those individuals, has a financial or other interest in or receives a tangible personal benefit from a firm considered for a contract. For purposes of this subsection, a "financial interest" means a financial interest which comprises more than five percent of the equity of the firm or business or more than five percent of the assets of the economic interest in indebtedness. It does not include an ownership interest held through a fiduciary, such as *Policy Code: 6401/9100* a mutual fund or blind trust, where the individual or individual's employer has no control over the selection of holdings.

4. Employees shall not influence or attempt to influence any person involved in making or administering a contract from which the employee will obtain a direct benefit as described in paragraph 2, above.

5. Employees shall not solicit or receive any gift, favor, reward, service, or promise of reward, including a promise of future employment, in exchange for recommending, influencing, or attempting to influence the award of a contract by the school system.

6. Employees shall notify the superintendent or designee in writing if they have an actual or potential conflict of interest under this policy or applicable state or federal law that would disqualify them from performing any aspect of their job responsibilities.

7. Employees shall not solicit or accept trips, meals, gratuities, gifts, favors, or anything of monetary value from current or recent (within the past year) contractors, subcontractors, or suppliers, or any persons or entities that foreseeably may bid on a contract in the future, unless the item is an unsolicited gift of nominal value (\$50 or less), and is one of the following: an advertising item or souvenir that is widely distributed; an honorarium for participating in a meeting; a meal provided at a banquet; or other item that is clearly permitted by state and federal law. Multiple permitted items from a single contractor may not exceed an aggregate value of \$100 in a twelve-month period.

Employees shall inform existing and potential contractors, subcontractors, and suppliers about these restrictions.

8. Employees shall not solicit or accept any gift from a current or potential provider of E-rate services or products in violation of applicable federal E-rate program gifting rules.

9. Employees shall not divulge confidential information to any unauthorized person. Confidential information includes but is not limited to (1) the school system's cost estimate for any public contract, prior to bidding or completion of other competitive

purchasing processes; and (2) the identity of contractors who have obtained proposals for bid purposes for a public contract, until the bids are opened in public and recorded in the Board minutes.

10. An employee shall not misuse information in violation of G.S. 14-234.1. Specifically, an employee shall not, in contemplation of the employee's own official action or that of the Board or others acting on behalf of the school system, or in reliance on information known to the employee in his or her official capacity and not made public, to: a. acquire a financial interest in any property, transaction, or enterprise; b. gain a financial benefit that may be affected by the information or contemplated action; or c. intentionally aid another to acquire a financial interest or gain a financial benefit from the information or contemplated action.

The superintendent or designee shall ensure that all affected personnel are aware of Board policy requirements and applicable laws. Any individual aware of any violation of this policy, policy 2121: Board Member Conflict of Interest, any policies regarding employee conflict of interest, the conflict-of-interest provisions of policy 8305: Federal Grant Administration, or applicable conflict of interest laws shall report such violation in accordance with policy 1760/7280: Prohibition Against Retaliation. Employees who violate this policy, policy 2121, any policies regarding employee conflict of interest, or the conflict-of-interest provisions of policy 8305, will be subject to disciplinary action.

Legal References: 2 C.F.R. 200.318(c); 47 C.F.R. 54.503; FCC Sixth Report and Order 10-175; G.S. 14-234, -234.1; 133-32, -33; Attorney General Opinion requested by L.W. Lamar regarding G.S. 133-32, the Applicability to Attorneys and Law Firms Providing Professional Services to Local Boards of Education, dated May 13, 1993



## Appendix A – Logic Model and Project Timeline

The logic model can be viewed and downloaded at this [link](#).

## **Appendix B – Grant Required Performance Measures**

### **TSL Performance Measures**

Performance Measures: The goal of TSL is to support educators, particularly those in high-need schools, to raise student academic achievement and close the achievement gap between high- and low-performing students. For the purposes of Department reporting under 34 CFR 75.110, we have established a set of performance measures:

- (a) the percentage of teachers and school leaders within the TSL assisted schools rated effective or higher by their districts' evaluation and support systems;
- (b) the percentage of teachers and school leaders across the participating district(s) that show improvements, over the previous year, on the student growth component of their evaluation rating;
- (c) the percentage of teachers and school leaders within the TSL-assisted schools that show improvements, over the previous year, on the student growth component of their evaluation rating;
- (d) the percentage of teachers and school leaders in TSL-assisted schools for whom evaluation ratings were used to inform decisions regarding recruitment, hiring, placement, retention, dismissal, professional development, tenure, promotion, or all of the above;
- (e) the percentage of teachers and school leaders within the participating district(s) who earned performance-based compensation based on their individual evaluation ratings;
- (f) the percentage of teachers and school leaders in TSL-funded schools who earned performance-based compensation based on their individual evaluation ratings;
- (g) the number of teachers receiving performance compensation disaggregated by race, gender, and where available, disability status;
- (h) the number of school leaders receiving performance compensation disaggregated by race, gender, and where available, disability status; and
- (i) the number of teachers receiving performance compensation for leadership responsibilities disaggregated by race, gender, and where available, disability status.

## **Appendix C – General Formatting Guidelines**

Please follow the following formatting guidelines when submitting your application.

### **1. Page and Margin Specifications**

A “page” is 8.5 in. x 11 in. on one side only with 1-inch margins at the top, bottom, and both sides.

### **2. Page Numbering**

Add page numbers using the header or footer function and place them at the bottom or upper right corner for ease of reading.

### **3. Spacing**

Text must be single-spaced.

### **4. Type Size (Font Size)**

Type must conform to the following three requirements:

1. The height of the letters must not be smaller than a type size of 12-point.
2. Type density, including characters and spaces, must be no more than 15 characters per inch (cpi). For proportional spacing, the average for any representative section of text must not exceed 15 cpi.
3. Type size must yield no more than 6 lines of type within a vertical inch.

If you use a 12-point Times New Roman font without compressing, kerning, condensing, or other alterations, and use footnotes sparingly, if at all, the application will typically meet these requirements. Readability should guide your selection of an appropriate font and your use of footnotes.

### **5. Citations**

Use the parenthetical author-date style for citations rather than numeric citations that correspond to the reference list.

### **6. Graphs, Diagrams, and Tables**

Use black and white in graphs, diagrams, tables, and charts. Text in figures, charts, and tables, including legends, may be in a type size smaller than 12-point but must be readily legible.

**VENDOR INFORMATION SHEET**

Company Name (include dba): \_\_\_\_\_

Phone number: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

Contact: \_\_\_\_\_

Corporate Office Address: \_\_\_\_\_

Wake County Office Address (if different from Corporate): \_\_\_\_\_

\_\_\_\_\_

Web Address: \_\_\_\_\_

Length of time in business: \_\_\_\_\_ Number of permanent employees: \_\_\_\_\_

DOT #: \_\_\_\_\_ (if applicable) MC License #: \_\_\_\_\_ (if applicable)

Insurance Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

The Wake County Public School System reserves the right to reject or disqualify any and all vendors, waive informalities and irregularities in the bid process, and to accept vendors, which are considered to be in the best interest of the School System.

**MINORITY, WOMEN, SMALL BUSINESS ENTERPRISE INFORMATION**

Pursuant to WCPSS Board of Education policy and NC General Statutes, WCPSS invites and encourages participation in this procurement process by businesses owned by minorities, women, small business enterprise, disabled business enterprises and non-profit work centers for the blind and severely disabled.

Parties are required to complete the following information when submitting their response to this request:

Check all that apply:

- ☐ Minority Owned Business
- ☐ Woman Owned Business
- ☐ Small Business Enterprise

\_\_\_\_\_ Yes, I certify that that my company has been certified by the North Carolina Department of Administration (HUB Office) as a Historically Underutilized Business.

\_\_\_\_\_ No, my company has not yet received HUB or MWBE certification but meet the above criteria.

\_\_\_\_\_ No, my company is not a minority, woman, or small business enterprise.

Vendor Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

## **FEDERAL CONTRACTING REQUIREMENTS**

This *Attachment* is incorporated into the Goods and/or Service Contract between WCPSS and the Vendor. Capitalized terms not defined in this Attachment shall have the meanings assigned to such terms in the Contract.

This Contract will be funded in whole or in part with federal funding. As such, federal laws, regulations, policies, and related administrative practices apply to this Contract. The most recent of such federal requirements, including any amendments made after the execution of this Contract shall govern the Contract, unless the federal government determines otherwise. This *Attachment* identifies the federal requirements that may be applicable to this contract. The Vendor is responsible for complying with all applicable provisions, updates or modifications that occur in the future relating to these clauses.

To the extent possible, the federal requirements contained in the most recent version of the Uniform Administrative Requirements for federal awards (Uniform Rules) codified at 2.C.F.R., Part 200, including any certifications and contractual provisions required by any federal statutes or regulation referenced therein to be included in this contract are deemed incorporated into this contract by reference and shall be incorporated into any sub-agreement or subcontract executed by the Vendor pursuant to its obligations under this Contract. The Vendor and its sub-contractors, if any, hereby represent and covenant that they had complied and shall comply in the future with all applicable federal, state, and local laws, regulations, and rules and School System policies and procedures, as amended from time to time, relating to work to be performed under this Contract. The following provisions are specifically incorporated into this Contract.

1. Equal Employment Opportunity. In the event this Contract meets the definition of “federally assisted construction contract” set forth in 41 C.F.R. § 60-1.3, the Vendor agrees to all requirements set forth in 41 C.F.R. 60-1.4(b), which are incorporated by reference into this Contract.
2. Compliance with Davis-Bacon Act. In the event this Contract involves a prime construction arrangement for an amount in excess of \$2,000, the Vendor agrees to comply with all provisions of the Davis-Bacon Act (40 U.S.C. §§ 1341-3144, 3146-3148), as supplemented by Department of Labor regulations (29 CFR Part 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”).
3. Compliance with Contract Work Hours and Safety Standards Act. In the event this Contract is for an amount in excess of \$100,000 and involves the employment of mechanics or laborers, the Vendor agrees to comply with all requirements of the Contract Work Hours and Safety Standards Act (40 U.S.C. §§ 3701-3708), as supplemented by Department of Labor regulations (29 CFR Part 5).
4. Compliance with Regulations Regarding Rights to Inventions. In the event the federal funds expended on this Contract meet the definition of “funding agreement” under 37 CFR § 401.2 (a), and this Contract involves the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the District agrees to comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.
5. Compliance with Clean Air Act and Federal Water Pollution Control Act. If the Contract is for an amount in excess of \$150,000, the Vendor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. §§ 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. §§ 1251-1387).
6. Compliance with Disbarment and Suspension Requirements. The Vendor certifies that it is not listed in the System for Award Management (SAM), as a party debarred, suspended, or otherwise excluded by agencies, or otherwise declared ineligible under statutory or regulatory authority.
7. Compliance with Byrd Anti-Lobbying Amendment. If the Contract is for an amount in excess of \$100,000, the Vendor agrees to provide the District with the certifications required by 31 U.S.C. § 1352.
8. Compliance with Solid Waste Disposal Act. In the event the Contract involves the purchase of more than \$10,000 in items designed by guidelines of the Environmental Protection Agency at 40 C.F.R. Part 247, the Parties agree to comply with the requirements of section 6002 of the Solid Waste Disposal Act. In particular, the Vendor certifies that the percentage of recovered materials to be used in the performance of the contract will be at least the amount required by applicable specifications or other contractual requirements.