

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

**REQUEST FOR PROPOSALS (RFP)**

**RFP NO. 2017-02**

*This RFP is available at the Office of Superintendent of Public Instruction (OSPI) website located at <http://www.k12.wa.us/RFP/> and at the Department of Enterprise Services, Washington Electronic Business Solution (WEBS) Procurement Website at <https://fortress.wa.gov/ga/webs/>. All RFP amendments or Consultant questions and OSPI answers will be posted to these sites. All interested Consultants must be registered with WEBS under the following commodity codes in order to receive notifications: **918-38**: Education Training and Consulting, **924-19**: Educational Research Services, and **952-77**: Research and Evaluation.*

**PROJECT TITLE:** WA-TPL Case Studies: Transforming Professional Learning

**PROPOSAL DUE DATE:** 4:00 p.m., Pacific Standard Time (PST), on Monday, January 30, 2017.

**ESTIMATED CONTRACT PERIOD:** February 20, 2017, to July 31, 2017. Amendments extending the period of performance, if any, shall be at the sole discretion of OSPI.

**CONSULTANT ELIGIBILITY:** This procurement is open to those Consultants that satisfy the minimum qualifications stated herein and that are available for work in Washington State.

**SUBMIT PROPOSAL TO:** Kyla Moore  
Assistant Contracts Administrator  
[contracts@k12.wa.us](mailto:contracts@k12.wa.us)

**FAXED PROPOSALS WILL NOT BE ACCEPTED.**

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## Section A. INTRODUCTION

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### 1. DEFINITIONS

Definitions for the purposes of this RFP include:

**Bid** – An offer, proposal, or quote for goods or services submitted in response to this RFP.

**Consultant/Proposer** – Individual or company (firm, state agency, etc.) submitting a proposal in order to attain a contract with OSPI.

**Contractor** – Individual or company whose proposal has been accepted by OSPI and is awarded a fully executed, written contract.

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

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

**Proprietary Information** – Information such as patents, technological information or other related information that the Consultant/Proposer does not want released or shared with the public.

**Request for Proposals (RFP)/Solicitation** – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the need at a given price.

**Vendor** – Individual or company (firm, state agency, etc.) submitting a proposal in order to attain a contract with OSPI.

### 2. PURPOSE OF REQUEST FOR PROPOSALS

The Office of Superintendent of Public Instruction (OSPI) is initiating this Request for Proposals (RFP) to solicit proposals from Consultants with experience in (1) program evaluation design and analysis and (2) preparing articulate, informative, comprehensive narrative documents.

The Consultant, using case studies of indicated districts as a basis, shall prepare a summary project description, a succinct, articulate, informative, comprehensive narrative document, with an executive summary, to serve as the Washington's Transforming Professional Learning project (WA-TPL) story, professionally designed and formatted for print and electronic dissemination.

To accomplish this task, the Consultant will delve into and investigate the design, purpose, scope, and external evaluation of WA-TPL and archival documents to gain a solid understanding of WA-TPL goals, objectives, activities, and impacts.

### **3. BACKGROUND**

OSPI is the primary agency charged with overseeing K–12 public education in Washington State. Led by State School Superintendent Randy Dorn (transitioning to Chris Reykdal on January 8, 2017), OSPI works with the state’s two hundred and ninety-five (295) school districts to administer basic education programs and implement education reform on behalf of more than one million public school students. OSPI is housed in the Old Capitol Building in Olympia.

Washington’s Transforming Professional Learning project (WA-TPL) has engaged a network of partners working on sustainable approaches to comprehensive professional learning. With grant support from the Bill & Melinda Gates Foundation, OSPI teamed up with Learning Forward Washington (LFWA), the Association of Educational Service Districts (AESD), and other partners and stakeholders to design and facilitate the project.

Currently in its fourth year of implementation, WA-TPL has been ongoing in participating districts and Educational Service Districts (ESDs) across Washington State since fall 2013. The three- (3-) year project was originally funded through October 2016; a project extension utilizing unexpended funds allows for a fourth year project extension through June 2017.

WA-TPL focuses on enhancing capacity for standards-based professional learning. School district teams combine efforts to build and support comprehensive professional learning systems. Some districts (identified as laboratory districts) agreed to transparency in their work; others (identified as critical friend districts) agreed to learn by collaborating with and offering feedback and support to lab teams. Educational Service Districts and professional learning coaches collaborate with districts to support and enhance project outcomes.

WA-TPL goals include:

1. 75,000 students in participating districts will show growth as a result of increased opportunities to engage in high quality English language arts, math, and science instruction aligned to the Common Core State Standards (CCSS) and Next Generation Science Standards (NGSS).
2. Partner districts will gain increased administrator and teacher leader capacity so every educator can meet professional expectations and every student can meet new career- and college-ready learning standards.
3. Beyond the WA-TPL partners, additional districts in each region will show growth and change as a result of regional engagement with the WA-TPL project.
4. Washington State will grow its infrastructure to support statewide professional learning and establish key components of a comprehensive professional learning system

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

- A. OSPI, in collaboration with its partners and stakeholders, seeks to document WA-TPL work, activities, and key learnings in a document suitable for public dissemination. This document, using the *Transforming Professional Learning in Washington State: Project Evaluation Report* (<http://k12.wa.us/CurriculumInstruct/WA-TPL/default.aspx>) as a foundation, will tell the WA-TPL story in such a way that other states and interested parties may understand and replicate the work. OSPI wants to present the WA-TPL

story in a visually interesting, stimulating way. For these reasons, OSPI seeks a flexible and collaborative contractor skilled in qualitative research methods and preparing articulate, informative, comprehensive narrative documents to prepare and deliver a descriptive narration of the WA-TPL project with content and format suitable for dissemination, using archival information and case studies of indicated districts and partners. Frequent and responsive collaboration and communication with OSPI will be essential.

- B. Case studies shall be based on interview questions to gather information (see Exhibit F, Sample Interview Questions).
  - a. In a selected sample of three (3) to five (5) districts participating in WA-TPL.
  - b. With WA-TPL district team members and coaches.
  - c. With input from OSPI and AESD.
- C. In order to accomplish the general objectives of the resulting contract, Contractor shall perform to the satisfaction of OSPI the following specific duties:
  - a. Research the project's background, design, purpose, and scope (see <http://k12.wa.us/CurriculumInstruct/WA-TPL/default.aspx>) to get familiarized with the project and to gain a solid understanding of project goals, objectives, activities, materials and resources, and ongoing partner and stakeholder roles.
    - i. Review documents and communications in the project's learning management system (Basecamp), the original project proposal to the Gates Foundation, archival documents, and input from project manager, ESD project champion, coaches, etc. (Online access to Basecamp will be given to identified Consultant.)
  - b. Research the final project report prepared by the external project evaluator to understand the impact of the WA-TPL project in indicated districts.
  - c. Design interview questionnaire to administer with three (3) to five (5) designated WA-TPL district teams.
  - d. Conduct in-person or telephone interviews with three (3) to five (5) designated WA-TPL district teams, OSPI, ESD partners, coaches, and the external evaluator.
  - e. Use ethical and sound research methodology throughout these efforts.
  - f. Analyze and summarize results in draft reports for review by the project manager and advisory team.
  - g. Meet with project manager and advisory team at selected milestones of the project for feedback.
  - h. Prepare final report with executive summary (maximum four [4] pages) pursuant to feedback from project manager and advisory team.
  - i. Submit final report and executive summary.

## 5. CONSULTANT QUALIFICATIONS

To ensure there is no actual or perceived violation of the State Ethics Law, current or former state officers or state employees who have had substantial participation or management in any part of this project or solicitation within the last two (2) years, are not eligible to bid on this solicitation, whether or not for compensation.

This solicitation is open to individuals that meet the following minimum criteria:

### Minimum Qualifications:

- Licensed to do business in the State of Washington. If not licensed, provide a written intent to become licensed in Washington within thirty (30) calendar days of being selected as the Apparent Successful Contractor.
- At least five (5) years of experience designing program evaluation and research.
- At least five (5) years of experience in graphic design of research findings.
- A history of focused and insightful qualitative data collection.
- A history of writing articulate, informative, comprehensive narrative documents.
- Procedures for telephone, mail, phone, and internet data collection.

Consultants who do not meet these minimum qualifications shall be deemed to be non-responsive, will not be evaluated, and a score will not be assigned.

### Desirable Qualifications:

- Ability to work quickly and efficiently.
- Ability to be flexible to participate in and respond to frequent informal communications to ensure thorough and accurate insights.
- Demonstrated success in design and methodology of key stakeholder interviews.
- Demonstrated expertise in public policy and/ or K-12 research.

## 6. PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is tentatively scheduled to begin on or about February 20, 2017, and end on or about July 31, 2017. The option to extend any contract resulting from this procurement shall be at the sole discretion of OSPI.

Additional services that are appropriate to the scope of this RFP, as determined by OSPI, may be added to the resulting contract by a written amendment mutually agreed to and executed by both parties.

## 7. FUNDING

OSPI has budgeted an amount not to exceed fifty thousand dollars (\$50,000) for this project. Proposals in excess of this amount will be rejected as non-responsive and will not be evaluated. OSPI reserves the right to negotiate up to an additional fifty thousand dollars (\$50,000) with the Apparent Successful Contractor *if* additional funding becomes available.

The Bill & Melinda Gates Foundation does not allow grant funds to be used for indirect costs.

Any applicable mileage, meals, lodging, or other travel-related expenses, will be reimbursed in accordance with [Washington State travel regulations](#) established by the Office of Financial Management.

Any contract awarded as a result of this procurement is contingent upon the availability of funding. The Consultant shall provide their most favorable and competitive cost estimate to perform the work.

## **8. AMERICANS WITH DISABILITIES ACT**

OSPI complies with the Americans with Disabilities Act (ADA). Consultants may contact the RFP Coordinator to receive this Request for Proposals in an alternative format.

## **Section B. GENERAL INFORMATION FOR CONSULTANTS**

### **1. RFP COORDINATOR**

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

<b>Name:</b>	Kyla Moore
<b>Address:</b>	600 Washington Street South P.O. Box 47200 Olympia, WA 98504-7200
<b>Email Address:</b>	<a href="mailto:contracts@k12.wa.us">contracts@k12.wa.us</a>

All communications concerning this RFP must be directed only to the RFP Coordinator via email. Any other communication will be considered unofficial and non-binding on OSPI. Consultants are to rely on written statements issued by the RFP Coordinator. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Consultant.

### **2. ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES**

<b>Item</b>	<b>Action</b>	<b>Date</b>
1.	OSPI issues RFP	January 6, 2017
2.	Question and Answer period	January 6–20, 2017
3.	Last date for questions regarding RFP	January 20, 2017
4.	Complaints due	January 20, 2017
5.	OSPI posts final Question and Answer Addendum or Amendment (if necessary)	January 23, 2017
6.	Proposals due	January 30, 2017
7.	OSPI conducts evaluation of written proposals	January 31 – February 3, 2017
8.	OSPI announces “Apparent Successful Contractor” and sends notification to unsuccessful proposer(s)	February 10, 2017
9.	OSPI conducts debriefing conferences (if requested)	As requested, per debriefing instructions
10.	Contract negotiation begins	February 10, 2017
11.	Anticipated contract start date	February 20, 2017

OSPI reserves the right to revise the above schedule.

### 3. COMPLAINT PROCEDURE

The complaint process is available to Consultants interested in this RFP. The complaint process allows Consultants to focus on the solicitation requirements and evaluation process and raise issues with these processes early enough in the process to allow an agency to correct a problem before proposals are submitted and time expended on evaluations.

A Consultant may submit a complaint based on any of the following:

- The solicitation unnecessarily restricts competition;
- The solicitation evaluation or scoring process is unfair or flawed; or
- The solicitation requirements are inadequate or insufficient to prepare a response.

Consultants may submit complaints up to five (5) business days prior to the proposal due date noted in the Estimated Schedule of Procurement Activities. However, Consultants are encouraged to submit complaints as soon as possible so OSPI can rectify the issue(s) early in the process. Complaints must be submitted to the RFP Coordinator. In order to be considered a valid complaint, the complaint must meet the following requirements:

- Must be in writing.
- Should clearly articulate the basis for the complaint.
- Should include a proposed remedy.

Complaints not received by the deadline noted in the Estimated Schedule of Procurement Activities will not be reviewed by OSPI.

The OSPI Contracts Administrator or an employee delegated by the Contracts Administrator will review valid complaints and respond to the submitter in writing. The response, and any changes to the RFP will be posted to WEBS prior to the proposal due date. Any complaint addressed during the complaint process cannot be raised during the protest process.

### 4. SUBMISSION OF PROPOSALS

Consultants shall submit proposals as an attachment to an email to the RFP Coordinator noted in Section B.1. ***Proposals must arrive by 4:00 p.m. in Olympia, WA, on January 30, 2017.*** (Please note RFP No. 2017-02 in the email subject line.) Attachments to the email shall be Microsoft Word format or in Portable Document Format (PDF). Zipped files may be received by OSPI and can be used for submission of proposals. OSPI does not assume responsibility for any problems with the electronic delivery of Applicant materials.

Proposals not received by the deadline will not be reviewed. Late proposals will not be accepted and will be automatically disqualified from further consideration. Proposals must respond to the procurement requirements. Do not respond by referring to material presented elsewhere. The proposal must be complete and must stand on its own merits.

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

## 5. PROPRIETARY INFORMATION/PUBLIC DISCLOSURE

Your entire response to this RFP is a public record and will be disclosed consistent with the Public Records Act), Chapter 42.56 RCW.

### A. CONFIDENTIAL DOCUMENTS

For the purposes of this RFP do not include confidential or proprietary information unless specifically requested by OSPI.

If OSPI requests confidential or proprietary information, you must clearly print the word "Confidential" on the lower right-hand corner of each page containing the confidential or proprietary information.

### B. PUBLIC RECORDS REQUESTS

If a public records request seeks your proposal and the proposal contains pages clearly marked "Confidential", OSPI will take the following steps:

- i. We will notify you. We will identify the requestor and the date that OSPI will disclose the requested records.
- ii. We will give you an opportunity to seek a court order to stop OSPI from disclosing the records.
- iii. We will not evaluate or defend your claim of confidentiality. We will not withhold or redact your documents without a court order.

If you have any questions, please do not hesitate to contact the OSPI Public Records Office at <http://www.k12.wa.us/publicrecordsrequest/>

## 6. ADDENDUMS AND AMENDMENTS TO THE RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be published on the OSPI website, at <http://www.k12.wa.us/RFP/>. For this purpose, the published Consultant questions and agency answers, and any other pertinent information, shall be considered an addendum to the RFP and also placed on the agency website. Additionally, all addenda referred to above will be released on WEBS under the commodity code(s) listed on the cover page of this RFP, for all Consultants who are registered. It will be the responsibility of interested Consultants to check the website periodically for RFP addenda and updates.

## 7. SMALL BUSINESS, WOMEN-/MINORITY- OR VETERAN-OWNED BUSINESS PARTICIPATION

In accordance with the legislative findings and policies set forth in chapter 39.19 RCW, the State of Washington encourages participation in all of its contracts by firms certified by the Office of Minority and Women's Business Enterprises (OMWBE). Participation may be either on a direct basis in response to this RFP or on a subcontractor basis. For more information on certification, contact the [Washington Office of Minority and Women's Business Enterprises](#).

43.60A.200 encourages the participation of Veteran and Service Member Owned Businesses certified by the Washington State Department of Veterans Affairs RCW [43.60A.195](#). For more information on certification, contact [Washington State Department of Veteran Affairs](#).

Additionally, per Department of Enterprise policy, agencies are encouraged to buy from in-state small business, including microbusinesses and minibusinesses.

However, no preference will be included in the evaluation of proposals, no minimum level of MWBE participation shall be required as a condition for receiving an award, and proposals will not be rejected or considered non-responsive on that basis. Any affirmative action requirements set forth in federal regulations or statutes included or referenced in the contract documents will apply.

Self-Certification should be submitted with the Contractor Intake Form (Exhibit D).

## **8. ACCEPTANCE PERIOD**

Proposals must provide sixty (60) days for acceptance by OSPI from the due date for receipt of proposals.

## **9. RESPONSIVENESS**

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

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

## **10. MOST FAVORABLE TERMS**

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

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

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

The Apparent Successful Contractor will be expected to enter into a contract which is substantially the same as the sample contract and its General Terms and Conditions. In no event is a Consultant to submit its own standard contract terms and conditions in response to this RFP. The Consultant may submit exceptions as allowed in the Certifications and Assurances section. OSPI will review requested exceptions and accept or reject the same at its sole discretion.

Should contract negotiations fail to be completed within two (2) weeks after initiation, the State may immediately cease contract negotiations, declare the Vendor with the second highest score as the new Apparent Successful Contractor, and enter into contract negotiations with that

Vendor. This process will continue until the Contracts are signed or no qualified Vendors remain.

## **12. COSTS TO PROPOSE**

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

## **13. NO OBLIGATION TO CONTRACT**

This RFP does not obligate the State of Washington or OSPI to contract for services specified herein. OSPI also reserves the right to cancel or to reissue the RFP in whole or in part, prior to execution of a contract without penalty.

## **14. REJECTION OF PROPOSALS**

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

## **15. COMMITMENT OF FUNDS**

Only an authorized representative of OSPI may legally commit OSPI to the expenditures of funds for a contract resulting from this RFP. No cost chargeable to the proposed contract may be incurred before receipt of a fully executed contract.

## **16. STATEWIDE VENDOR PAYMENT REGISTRATION**

Consultants awarded contracts as a result of this RFP will be required to register as a Statewide Vendor (SWV). The SWV file is a central vendor file maintained by the Office of Financial Management for use by Washington State agencies in processing vendor payments. This allows you, as a vendor, to receive payments from all participating state agencies by direct deposit, the State's preferred method of payment. Effective April 30, 2011, all OSPI Contractors are required to register as a Statewide Vendor. Participation in direct deposit is optional. For online registration visit:

<http://des.wa.gov/services/ContractingPurchasing/Business/VendorPay/Pages/default.aspx>

## **17. INSURANCE COVERAGE**

The Apparent Successful Contractor must comply with the insurance requirements identified in the General Terms and Conditions.

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

## **Section C. PROPOSAL CONTENTS**

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Proposals must be formatted to print on eight and one-half by eleven (8 ½ x 11) inch paper size with individual sections clearly identified. The Letter of Submittal, excluding the signed Certifications and Assurances and Contractor Intake Form, shall be a maximum of one (1) page. The four (4) major sections of the proposal are to be submitted in the order noted below:

1. Letter of Submittal including signed:
  - a. Certifications and Assurances
  - b. Contractor Intake Form
2. Technical Proposal
3. Management Proposal
4. Cost Proposal

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

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

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

The Letter of Submittal, the attached Certifications and Assurances, and the attached Contractor Intake Form must be signed and dated by a person authorized to legally bind the Consultant to a contractual relationship, (e.g., the President or Executive Director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship).

Along with introductory remarks, please attach to the Letter of Submittal the following information about the Consultant and any proposed subcontractors:

1. Name, address, and telephone number of each principal officer (President, Vice President, Treasurer, Chairperson of the Board of Directors, etc.);
2. Location of the facility from which the Consultant would operate; and
3. A detailed list of all materials and enclosures included in the Proposal.

### **2. TECHNICAL PROPOSAL (SCORED)**

The Technical Proposal must contain a comprehensive description of services including the following elements:

- A. Project Approach/Methodology** – Include a complete description of the Consultant’s proposed approach and methodology for the project. This section should convey Consultant’s understanding of the proposed project.
- B. Work Plan** – Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP.

This section of the Technical Proposal must contain sufficient detail to convey to members of the evaluation team the Consultant’s knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of OSPI staff. The Consultant may also present any creative approaches that might be appropriate and may provide any pertinent supporting documentation.

- C. Project Schedule** – Include a project schedule indicating when the elements of the work will be completed and when deliverables, if any, will be provided. The WA-TPL Project Manager has provided a suggested timeline for deliverables, below; however, consultants may choose to submit alternatives to this schedule.

<b>Deliverable</b>	<b>Due Date</b>
Meet with OSPI to finalize contract and establish collaborative routines and deliverables.	Monday, February 20, 2017
Discuss with OSPI the Contractor’s thorough research and understanding of the project’s background and external evaluator’s final project report.	By March 17, 2017
Design and submit draft of interview questionnaire(s) to administer with three (3) to five (5) designated WA-TPL district teams, OSPI, ESD partners, coaches, and the external evaluator	By March 31, 2017
Conduct in-person or telephonic interviews with three (3) to five (5) designated WA-TPL district teams, OSPI, ESD partners, coaches, and the external evaluator.	April to May 12, 2017
Discuss contractor’s analysis of data from in-person or telephonic interviews.	By May 31, 2017
Submit draft narrative project description, designed and formatted for dissemination.	By June 30, 2017
Submit final document, a thorough narrative description of the WA-TPL project with content and format suitable for dissemination	July 31, 2017

- D. Deliverables** – Fully describe deliverables to be submitted under the proposed contract.
- E. Outcomes and Performance Measurement** – Describe the impacts/outcomes the consultant proposes to achieve as a result of the delivery of these services including how these outcomes would be monitored, measured and reported to the state agency.

**Please Note: Mere repetition of the work statement in Section A.4 or C.2.C or elsewhere in this RFP document will not be considered responsive.**

**F. Risks**

Define risks you identify as being significant to the success of the project. Include how you would propose to effectively monitor, mitigate, and manage these risks, including reporting of risks to the agency’s contract manager. Please include a description of the measures to protect confidentiality and safety of stored data.

### **3. MANAGEMENT PROPOSAL**

#### **A. Project Management (SCORED)**

1. **Project Team Structure/Internal Controls** – Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any subcontractors. Provide an organizational chart of your firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the firm. This chart must also show lines of authority to the next senior level of management. Include who within the firm will have prime responsibility and final authority for the work.
2. **Staff Qualifications/Experience** – Identify staff, including subcontractors, who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide résumés for the named staff, which include information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Consultant must commit that staff identified in its proposal will actually perform the assigned work. Any staff substitution must have the prior approval of OSPI.

#### **B. Experience of the Consultant (SCORED)**

1. Include other relevant experience that indicates the qualifications of the Consultant, and any subcontractors, for the performance of the potential contract.
2. Include a list of contracts the Consultant has had during the last five (5) years that relate to the Consultant's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses.
3. Provide three (3) examples of products from similar research projects from within the past ten (10) years

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

List names, addresses, telephone numbers, and fax numbers/email addresses of three (3) business references for whom work has been accomplished and briefly describe the type of service provided for them. By submitting a proposal in response to this RFP, the vendor and team members grant permission to OSPI to contact these references and others, who from OSPI's perspective, may have pertinent information. OSPI may or may not, at OSPI's discretion, contact these references or others. Do not include current OSPI staff as references.

#### **D. Past Performance**

Provide information regarding past performance by indicating if the Consultant has received notification of contract breach in the past five (5) years. This does not lead to automatic disqualification. However, OSPI reserves the right to disqualify Consultant proposals based on the Consultant's historical performance.

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

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

**Identification of Costs (SCORED)** – Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. The Consultant is to submit a fully detailed budget including staff costs, administrative costs, travel costs, and any other expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Consultants are required to collect and pay Washington State sales tax, if applicable.

**Indirect Costs:** The Bill & Melinda Gates Foundation does not allow grant funds to be used for indirect costs.

**Travel Costs:** If the Consultant's proposal includes any travel-related expenses as a line item, they are to be broken out separately. Any applicable mileage, meals, lodging, or other travel-related expenses, will be reimbursed in accordance with [Washington State travel regulations](#) established by the Office of Financial Management.

**Subcontractor Costs:** Costs for subcontractors are to be broken out separately. Please note if any subcontractors are certified by the Office of Minority and Women's Business Enterprises.

## **Section D. EVALUATION AND CONTRACT AWARD**

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### **1. EVALUATION PROCEDURE**

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

### **2. EVALUATION WEIGHTING AND SCORING**

The following points will be assigned to the proposals for evaluation purposes:

<b>Technical Proposal</b>		<b>70 points</b>
Project Approach/Methodology	20 points (maximum)	
Quality of Work Plan	30 points (maximum)	
Project Schedule	10 points (maximum)	
Project Deliverables	10 points (maximum)	
<b>Management Proposal</b>		<b>60 points</b>
Project Team Structure/Internal Controls	20 points (maximum)	
Staff Qualifications/Experience	20 points (maximum)	
Experience of the Consultant	10 points (maximum)	
Three examples of products from similar research projects from within the past 10 years	10 points (maximum)	
<b>Cost Proposal</b>		<b>20 points</b>
<b>Subtotal</b>		<b>150 points</b>
Oral Presentation (if determined necessary by OSPI)		10 points
Reference Checks (if determined necessary by OSPI)		10 points
<b>GRAND TOTAL FOR PROPOSAL</b>		<b>170 points</b>

References may be contacted for the top-scoring proposer(s) only and will then be scored and added to the total score.

### **3. ORAL PRESENTATIONS MAY BE REQUIRED**

OSPI, at its sole discretion, may elect to select the top scoring finalists from the written evaluation for an oral presentation and final determination of contract award. Should OSPI elect to hold oral presentations, it will contact the top-scoring firm(s) to schedule a date, time and location. Commitments made by the Consultant at the oral interview, if any, will be considered binding.

The scores from the written evaluation and the oral presentation combined together will determine the Apparent Successful Contractor.

#### **4. NOTIFICATION TO PROPOSERS**

Proposals that have not been selected for further negotiation or award will be notified via email by the RFP Coordinator.

#### **5. SELECTION OF APPARENT SUCCESSFUL CONTRACTOR**

The Consultant submitting the Response most advantageous to the State will be declared the Apparent Successful Contractor (ASC). The date of announcement of the ASC will be the date the announcement letter is postmarked or, if emailed, the date the email is sent. The State will enter into contract negotiations with the ASC. Should contract negotiations fail to be completed within two (2) weeks after initiation, the State may immediately cease contract negotiations, declare the Vendor with the second highest score as the new ASC, and enter into contract negotiations with that Vendor. This process will continue until the Contracts are signed or no qualified Vendors remain.

#### **6. DEBRIEFING OF UNSUCCESSFUL PROPOSERS**

Upon request, an individual debriefing conference will be scheduled with an unsuccessful Proposer. The request for a debriefing conference must be received by the RFP Coordinator within three (3) business days after the Notification of Unsuccessful Consultant letter or e-mail is sent to the Consultant. The debriefing must be held within three (3) business days of the request, unless otherwise agreed upon by the RFP Coordinator and Proposer.

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

#### **7. PROTEST PROCEDURE**

This protest procedure is available to Consultants who submitted a response to this RFP document and who have participated in a debriefing conference. Upon completion of the debriefing conference, the Consultant is allowed five (5) business days to file a protest of the acquisition with the RFP Coordinator. Protests may be submitted by fax or email, and must be followed by an original, signed document.

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

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

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

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

Protests not based on procedural matters will not be considered. Protests will be rejected as without merit if they address issues such as: 1) an evaluator's professional judgment on the quality of a proposal, 2) OSPI's assessment of its own and/or other agencies needs or requirements, or 3) a complaint raised during the Complaint Procedure.

Upon receipt of a protest, a protest review will be held by OSPI. OSPI Contracts Administrator or an employee delegated by the Contracts Administrator who was not involved in the procurement will consider the record and all available facts and issue a decision within ten (10) business days of receipt of the protest. If additional time is required, the protesting party will be notified.

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

The final determination of the protest shall:

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

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

## **Section E. RFP EXHIBITS**

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- Exhibit A Certifications and Assurances
- Exhibit B Sample Contract
- Exhibit C General Terms and Conditions
- Exhibit D Contractor Intake Form
- Exhibit E Proposal Checklist
- Exhibit F Sample Interview Questions

**EXHIBIT A  
CERTIFICATION AND ASSURANCES**

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

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

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

---

**Signature of Proposer**

**Date**

---

**Print Name**

**Title**

**EXHIBIT B**  
**SAMPLE CONTRACT**

**Contract No.** \_\_\_\_\_

between

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

(hereinafter referred to as Superintendent)  
Old Capitol Building, P.O. Box 47200  
Olympia, WA 98504-7200

and

**[CONTRACTOR NAME]**

(hereinafter referred to as Contractor)  
[Contractor Address]

Federal Identification # -  
Unified Business Identifier # - -

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

**I. DUTIES OF THE CONTRACTOR**

D. The general objective(s) of this contract is/are as follows:

[A brief description of the agreed upon services will be included here.]

E. In order to accomplish the general objective(s) of this contract, Contractor shall perform the following specific duties to the satisfaction of the Superintendent's designee, [OSPI Contract Manager]:

[A description of the work to be performed by Contractor in detail, including a breakdown of the quantifiable steps or components of what the Contractor is to do will be included here.]

F. The Contractor shall produce the following written reports or other written documents (deliverables) by the dates indicated below:

[Deliverables may be listed here.]

All written reports required under this contract must be delivered to the Superintendent's designee in accordance with the schedule above.

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

No costs shall be incurred under this Contract until fully executed and subsequent to the termination date.

The schedule of performance of Contractor's duties is as follows:

[start date], or date of execution, whichever is later, through [end date].

**III. DUTIES OF THE SUPERINTENDENT**

A. In consideration of Contractor's satisfactory performance of the duties set forth herein, Superintendent shall compensate Contractor at a rate not to exceed a total of \$ . Payment for satisfactory performance shall not exceed this amount unless the parties mutually agree to a higher amount prior to the commencement of any work, which will cause the maximum payment to be increased.

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

- Travel and per diem expenses for [#] person(s) in the amounts and for the purposes otherwise established for state employees at the time of incurrence by the rules and regulatory policies of the Office of Financial Management (OFM) not to exceed \$ . Contractor's "official duty station" (i.e., the origin of reimbursable travel and/or per diem) shall be [official duty station].

*and/or*

- Expenses incurred for the following specified purposes not to exceed a total of \$ . Contractor must submit receipts or other documentation.

**Maximum consideration for this entire contract shall not exceed \$ .**

Funds for the payment of this contract are provided by federal program(s) [program title], Catalog of Federal Domestic Assistance #(s) [CFDA#].

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

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

[Schedule of payments may be included here.] *or*

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

Invoice(s) will be paid only after approval by the Superintendent's designee and Agency Financial Services, OSPI. The invoice shall include an original signature, the contract number, and document to the Superintendent's designee's satisfaction a description of the work performed and payment requested. Within approximately thirty (30) working days of

the Superintendent's designee receiving and approving the invoice, payment will be mailed or electronically transferred to the Contractor by Agency Financial Services, OSPI.

- D. Final payment shall be made after acceptance by the Superintendent's Contract Manager or Designee if received by the Superintendent within ninety (90) days after the contract expiration date, unless negotiated with the Contract Manager or Designee and the Fiscal Budget Analyst.

**IV. RENEWAL (OPTIONAL CLAUSE)**

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

**V. CONTRACT MANAGEMENT**

The following shall be the contact person for all communications and billings regarding the performance of this contract.

<b>Contractor</b>	<b>Superintendent</b>
[Contract Manager's Name]	[Contract Manager's Name]
[Contract Manager's Title]	[Contract Manager's Title]
[Contract Manager's Address]	Old Capitol Building, P.O. Box 47200 Olympia, WA 98504-7200
Phone: (    )    -	Phone: (    )    -
Fax: (    )    -	Fax: (    )    -
Email: [Contract Manager's Email Address]	Email: [Contract Manager's Email Address]

**VI. INCORPORATION OF ATTACHMENTS AND ORDER OF PRECEDENCE**

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

- Applicable Federal and state of Washington statutes and regulations
- Special Terms and Conditions as contained in this basic contract instrument
- Attachment A – Contract for Services, General Terms and Conditions
- Attachment B – Request for Proposals with any formal RFP amendments that change scope of work, etc.
- Attachment C – Contractor’s Proposal
- Any other provision, term or material incorporated herein by reference or otherwise incorporated.

**VII. APPROVAL**

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

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

[Contractor Name]

Superintendent of Public Instruction  
State of Washington

\_\_\_\_\_  
Signature Title

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

\_\_\_\_\_  
Print Name Date

\_\_\_\_\_  
Date

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

Approved as to FORM ONLY  
by the Assistant Attorney General

Non-profit organization?  yes\*  no  
\*If yes, under what IRS section? Please attach a copy.

\_\_\_\_\_

## **EXHIBIT C**

### **GENERAL TERMS AND CONDITIONS**

1. **Access to Data.** In compliance with Chapter 39.26 RCW, the Contractor shall provide access to data generated under this Contract to the Superintendent, the Joint Legislative Audit and Review Committee, and the State Auditor at no additional cost. This includes access to all information that supports the findings, conclusions, and recommendations of the Contractor's reports, including computer models and methodology for those models.
2. **Alterations and Amendments.** This Contract may be amended only by mutual agreement of the parties. Such amendments shall not be binding unless they are in writing and signed by personnel authorized to bind each of the parties.
3. **Americans with Disabilities Act (ADA) of 1990, Public Law 101-336, also referred to as the "ADA" 28 CFR Part 35.** The Contractor must comply with the ADA, which provides comprehensive civil rights protection to individuals with disabilities in the areas of employment, public accommodations, state and local government services, and telecommunications.
4. **Assignment.** Neither this Contract, nor any claim arising under this Contract, shall be transferred or assigned by the Contractor without prior written consent of the Superintendent.
5. **Assurances.** The Superintendent and the Contractor agree that all activity pursuant to this Contract will be in accordance with all applicable current federal, state and local laws, rules and regulations.
6. **Attorney's Fees.** In the event of litigation or other action brought to enforce contract terms, each party agrees to bear its own attorney's fees and costs.
7. **Budget Revisions.** Any monetary amount budgeted by the terms of this Contract for various activities and line item objects of expenditure may be revised without prior written approval of Superintendent, so long as the revision is no more than ten percent (10%) of the original line item amount and the increase in an amount is offset by a decrease in one or more other amounts equal to or greater than the increase. All other budget revisions exceeding ten percent (10%) shall only be made with the prior written approval of the Superintendent.
8. **Certification Regarding Debarment, Suspension, and Ineligibility.** The Contractor certifies that neither it nor its principals are debarred, suspended, proposed for debarment, or voluntarily excluded from participation in transactions by any federal department or agency. The Contractor further certifies that they will ensure that potential subcontractors or any of their principals are not debarred, suspended, proposed for debarment, or voluntarily excluded from participation in covered transactions by any federal department or agency. Contractor may do so by obtaining a certification statement from the potential subcontractor or subrecipient or by checking the "List of Parties Excluded from Federal Procurement and Non-Procurement Programs" provided on-line by the General Services Administration, and Washington State vendor debarment list.

9. **Change in Status.** In the event of substantive change in the legal status, organizational structure, or fiscal reporting responsibility of the Contractor, Contractor agrees to notify the Superintendent of the change. Contractor shall provide notice as soon as practicable, but no later than thirty (30) days after such a change takes effect.
10. **Confidentiality.** The Contractor acknowledges that all of the data, material and information which originates from this Contract, and any student assessment data, material and information which will come into its possession in connection with performance under this Contract, consists of confidential data owned by the Superintendent or confidential personally identifiable data subject to the federal Family Educational Rights and Privacy Act or other privacy laws, and that disclosure to or use by third parties would be damaging. The Contractor, therefore, agrees to hold all such material and information in strictest confidence, not to make use thereof other than for the performance of this Contract, to release it only to authorized employees and agents requiring such information and not release or disclose it to any other party. The Contractor agrees to release such information or material only to employees and agents who have signed a written agreement expressly prohibiting disclosure.
11. **Copyright Provisions.** Unless otherwise provided, all Materials produced under this Contract shall be considered "works for hire" as defined by the U.S. Copyright Act and shall be owned by the Superintendent. The Superintendent shall be considered the author of such Materials. If Materials are not considered "works for hire", Contractor hereby irrevocably assigns all right, title, and interest in Materials, including all intellectual property rights, to the Superintendent effective from the moment of creation of such Materials.

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

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

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

12. **Covenant Against Contingent Fees.** The Contractor warrants that no person or selling agent has been employed or retained to solicit or secure this Contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee,

excepting bona fide employees or bona fide established agent maintained by the Contractor for the purpose of securing business. The Superintendent shall have the right, in the event of breach of this clause by the Contractor, to annul this Contract without liability or, in its discretion, to deduct from the contract price or consideration or recover by other means the full amount of such commission, percentage, brokerage or contingent fees.

13. **Disputes.** In the event that a dispute arises under this Contract, it shall be determined by a Dispute Board in the following manner: (1) The Superintendent shall appoint a member to the Dispute Board; (2) the Contractor shall appoint a member to the Dispute Board; (3) the Superintendent and the Contractor shall jointly appoint a member to the Dispute Board; (4) the Dispute Board shall evaluate the dispute and make a determination of the dispute; and, the determination of the Dispute Board shall be final and binding on the parties hereto.

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

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

trademark, trade name, or otherwise results in an unfair trade practice or in unlawful restraint of competition. Contractor's obligation to indemnify, defend and hold harmless includes any claim by Contractor's agents, employees, representatives, or any subcontractor or its employees.

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

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

**19. Independent Capacity of the Contractor.** The parties intend that an independent Contractor relationship will be created by this Contract. The Contractor and his/her employees or agents performing under this Contract are not employees or agents of the Superintendent. The Contractor will not hold himself/herself out as nor claim to be an officer or employee of the Superintendent or of the state of Washington by reason hereof, nor will the Contractor make any claim or right, privilege, or benefit which would accrue to such employee under law. Conduct and control of the work will be solely with the Contractor.

**20. Insurance.**

a. **Worker's Compensation Coverage.** The Contractor shall at all times comply with all applicable worker's compensation, occupational disease, and occupational health and safety laws, statutes, and regulations to the fullest extent applicable. This requirement includes the purchase of industrial insurance coverage for the Contractor's employees, as may now hereafter be required of an "employer" as defined in Title 51 RCW. Such worker's compensation and occupational disease requirements shall include coverage for all employees of the Contractor, and for all employees of any subcontract retained by the Contractor, suffering bodily injury (including death) by accident or disease, which arises out of or in connection with the performance of this Contract. Satisfaction of these requirements shall include, but shall not be limited to:

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

Except to the extent prohibited by law, the program of the Contractor's compliance with worker's compensation and occupational disease laws, statutes,

and regulations in 1), 2), and 3) above shall provide for a full waiver of rights of subrogation against the Superintendent, its directors, officers, and employees.

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

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

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

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

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

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

Each Occurrence	\$1,000,000
General Aggregate Limits (other than products-completed operations)	\$2,000,000
Products-Completed Operations Limit	\$2,000,000
Personal and Advertising Injury Limit	\$1,000,000
Fire Damage Limit (any one fire)	\$50,000

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

- e. **Proof of Insurance.** Certificates and or evidence satisfactory to the Superintendent confirming the existence, terms and conditions of all insurance required above shall be delivered to the Superintendent within five (5) days of the Contractor's receipt of Authorization to Proceed.
- f. **General Insurance Requirements.** Contractor shall, at all times during the term of the Contract and at its cost and expense, buy and maintain insurance of the types and amounts listed above. Failure to buy and maintain the required insurance may result in the termination of the Contract at the Superintendent's option. By requiring insurance herein, Superintendent does not represent that coverage and limits will be adequate to protect Contractor and such coverage and limits shall not limit Contractor's liability under the indemnities and reimbursements granted to the Superintendent in this Contract.

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

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

25. **Payments.** No payments in advance or in anticipation of services or supplies to be provided under this Contract shall be made by the Superintendent. All payments to the Contractor are conditioned upon (1) Contractor's submission of a properly executed and supported voucher for payment, including such supporting documentation of performance and supporting documentation of costs incurred or paid, or both as is otherwise provided for in the body of this Contract under Duties of the Superintendent, and (2) Acceptance and certification by the Superintendent or designee of satisfactory performance by the Contractor.

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

26. **Public Disclosure.** Contractor acknowledges that the Superintendent is subject to the Washington State Public Records Act, Chapter 42.56 RCW, and that this Contract shall be a public record as defined in RCW 42.56. Any specific information that is claimed by the Contractor to be confidential or proprietary must be clearly identified as such by the Contractor. To the extent consistent with chapter 42.56 RCW, the Superintendent shall maintain the confidentiality of all such information marked confidential or proprietary. If a request is made to view the Contractor's information, the Superintendent will notify the Contractor of the request and the date that such records will be released to the requester unless Contractor obtains a court order enjoining that disclosure. If the Contractor fails to obtain the court order enjoining disclosure, the Superintendent will release the requested information on the date specified.

27. **Publicity.** The Contractor agrees to submit to the Superintendent all advertising and publicity matters relating to this Contract which in the Superintendent's judgment, Superintendent's name can be implied or is specifically mentioned. The Contractor agrees not to publish or use such advertising and publicity matters without the prior written consent of the Superintendent.

28. **Registration with Department of Revenue.** The Contractor shall complete registration with the Department of Revenue and be responsible for payment of all taxes due on payments made under this Contract.

29. **Records Maintenance.** The Contractor shall maintain all books, records, documents, data and other evidence relating to this Contract and performance of the services described herein, including but not limited to accounting procedures and practices which sufficiently and properly reflect all direct and indirect costs of any nature expended in the performance of this Contract. Contractor shall retain such records for a period of six years following the date of final payment. At no additional cost, these records, including materials generated under the Contract, shall be subject at all reasonable times to inspection, review or audit by the Superintendent, personnel duly authorized by the Superintendent, the Office of the State Auditor, and federal and state officials so authorized by law, regulation or agreement.

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

30. **Right of Inspection.** The Contractor shall provide right of access to its facilities to the Superintendent or any of its officers at all reasonable times, in order to monitor and evaluate performance, compliance, and/or quality assurance under this Contract on behalf of the Superintendent. All inspections and evaluations shall be performed in such a manner that will not unduly interfere with the Contractor's business or work hereunder.
31. **Severability.** The provisions of this Contract are intended to be severable. If any term or provision is illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of the Contract.
32. **Site Security.** While on Superintendent premises, Contractor, its agents, employees, or subcontractors shall conform in all respects with physical, fire or other security policies or regulations.
33. **Subcontracting.** Neither the Contractor nor any subcontractor shall enter into subcontracts for any of the work contemplated under this Contract without obtaining prior written approval of the Superintendent. In no event shall the existence of the subcontract operate to release or reduce liability of the Contractor to the Superintendent for any breach in the performance of the Contractor's duties. This clause does not include contracts of employment between the Contractor and personnel assigned to work under this Contract.
34. **Taxes.** All payments accrued on account of payroll taxes, unemployment contributions, any other taxes, insurance or other expenses for the Contractor or its staff shall be the sole responsibility of the Contractor.
35. **Termination for Convenience.** Except as otherwise provided in this Contract, the Superintendent or Superintendent's Designee may, by ten (10) days written notice, beginning on the second day after the mailing, terminate this Contract in whole or in part. The notice shall specify the date of termination and shall be conclusively deemed to have been delivered to and received by the Contractor as of midnight the second day of mailing in the absence of proof of actual delivery to and receipt by the Contractor. If this Contract is so terminated, the Superintendent shall be liable only for payment required under the terms of the Contract for services rendered or goods delivered prior to the effective date of termination.
36. **Termination for Default.** In the event the Superintendent determines the Contractor has failed to comply with the conditions of this Contract in a timely manner, the Superintendent has the right to suspend or terminate this Contract. The Superintendent shall notify the Contractor in writing of the need to take corrective action. If corrective action is not taken within thirty (30) days, the Contract may be terminated. The Superintendent reserves the right to suspend all or part of the Contract, withhold further payments, or prohibit the Contractor from incurring additional obligations of funds during investigation of the alleged compliance breach and pending corrective action by the Contractor or a decision by the Superintendent to terminate the Contract. In the event of termination, the Contractor shall be liable for damages as authorized by law including, but not limited to, any cost difference between the original Contract and the replacement or cover Contract and all administrative costs directly related to the replacement Contract, e.g., cost of the competitive bidding, mailing, advertising and staff time. The termination shall be deemed to be a "Termination for Convenience" if it is determined that the Contractor: (1) was not in default; or (2) failure to perform was outside of his or

her control, fault or negligence. The rights and remedies of the Superintendent provided in this Contract are not exclusive and are in addition to any other rights and remedies provided by law.

**37. Termination Due to Funding Limitations.** In the event funding from state, federal, or other sources is withdrawn, reduced, or limited in any way after the effective date of this Contract and prior to normal completion, the Superintendent may, without advance notice and without liability for damages, terminate the Contract under the "Termination for Convenience" clause. The Superintendent and Contractor may, however, renegotiate this Contract under any such new funding limitations and conditions.

**38. Termination Procedure.** Upon termination of this Contract the Superintendent, in addition to other rights provided in this Contract, may require the Contractor to deliver to the Superintendent any property specifically produced or acquired for the performance of such part of this Contract as has been terminated. The provisions of the "Treatment of Assets" clause shall apply in such property transfer.

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

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

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

- a. Stop work under this Contract on the date and to the extent specified, in the notice;
- b. Place no further orders or subcontractors for materials, services or facilities except as may be necessary for completion of such portion of the work under the Contract that is not terminated;
- c. Assign to the Superintendent, in the manner, at the times, and to the extent directed by the Superintendent, all rights, title, and interest of the Contractor under the orders and subcontracts in which case the Superintendent has the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts;
- d. Settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with the approval or ratification of the

Superintendent to the extent the Superintendent may require, which approval or ratification shall be final for all the purposes of this clause;

- e. Transfer title to the Superintendent and deliver, in the manner, at the times and to the extent as directed by the Superintendent, any property which, if the Contract had been completed, would have been required to be furnished to the Superintendent;
- f. Complete performance of such part of the work not terminated by the Superintendent; and
- g. Take such action as may be necessary, or as the Superintendent may direct, for the protection and preservation of the property related to this Contract which, in is in the possession of the Contractor and in which the Superintendent has or may acquire an interest.

**39. Treatment of Assets.** Except as otherwise provided for in the Contract, the ownership and title to all real property and all personal property purchased by the Contractor in the course of performing this Contract with moneys paid by the Superintendent shall vest in the Superintendent, except for supplies consumed in performing this Contract. The Contractor shall (1) maintain a current inventory of all the real and personal property; (2) label all the property "State of Washington, Superintendent of Public Instruction"; and, (3) surrender property and title to the Superintendent without charge prior to settlement upon completion, termination or cancellation of this Contract.

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

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

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

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

**40. Waiver.** A failure by either part to exercise its rights under this Agreement shall not preclude that party from subsequent exercise of such rights and shall not constitute a waiver of any other rights under this agreement. Waiver of any default or breach shall not be deemed to be a waiver of any subsequent default or breach. Any waiver shall not be construed to be a modification of the terms of this Agreement unless stated to be such in writing and signed by personnel authorized to bind each of the parties.

This attachment can be found as an editable Word document on OSPI's website:

<http://www.k12.wa.us/RFP/default.aspx>



## EXHIBIT D CONTRACTOR INTAKE FORM

**All potential Office of Superintendent of Public Instruction Contractors or Governmental Entities must sign and submit this form before an OSPI contract or Agreement is offered.**

<b>1. CONTRACTOR NAME (AS LEGALLY REGISTERED WITH THE IRS):</b>		<b>CONTRACTOR DBA (DOING BUSINESS AS) NAME:</b>	
<b>2. CONTRACTOR ADDRESS &amp; CONTACT INFORMATION:</b>			
<b>ADDRESS (NUMBER, STREET, AND APT OR SUITE)</b>	<b>CITY</b>	<b>STATE</b>	<b>ZIP CODE</b>
<b>BUSINESS PHONE NUMBER</b>	<b>BUSINESS FAX NUMBER</b>		
<b>CONTRACT MANAGER NAME</b>	<b>CONTRACT MANAGER EMAIL ADDRESS</b>		
<b>CONTRACT MANAGER PHONE NUMBER</b>	<b>CONTRACT MANAGER FAX</b>		
<b>3. CONTRACTOR LICENSE:</b>			
Do you have a current Washington State business license?		<input type="checkbox"/> Yes <input type="checkbox"/> No <b>If yes, attach a copy.</b>	
Have you had any contract to provide services terminated for default? <input type="checkbox"/> Yes <input type="checkbox"/> No		If you do not have a Washington State business license, explain why you are exempt from registering your business with the State of Washington.	
<b>If yes, please attach a list of each terminated contract with an explanation of the situation involved.</b>		To file for a Master Business Application, visit <a href="http://www.dor.wa.gov">www.dor.wa.gov</a> .	
<b>4. BUSINESS INFORMATION:</b>			
<b>How is your business organized?</b> Please select		If filing as Corporation, non-profit, attach a copy of 501(c) status.	
<b>Is your business a small women/minority-, or veteran-owned business as defined in <a href="#">Chapter 39.26.010 RCW</a>?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No		If yes, please complete and submit the <a href="#">Self-Certification Statement</a> with this form. Refer to Chapter 39.26.010 RCW for more information.	
<b>TAXPAYER IDENTIFICATION NUMBER (TIN)</b>  SSN:    -    -            EIN:    -		For individuals, this is your Social Security Number (SSN). For other entities (corporations, school districts, etc.) this is your Employer Identification Number (EIN).	
<b>STATEWIDE VENDOR NUMBER</b> SWV        -		Individuals awarded contracts with OSPI are <b>required</b> to register as a Statewide Vendor. Visit the Department of Enterprise Services to <a href="#">register as a Statewide Vendor</a> .	
<b>5. WASHINGTON STATE EMPLOYMENT (Not applicable to ESDs, School Districts, and State Agencies):</b>			
Are you, or any of your business partners, directors, officers, managers, employees, or board members current or former (within the last 24 months) officers or employees of the State of Washington? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A			
If you answered yes or are unsure, contact the <a href="#">Executive Ethics Board</a> for guidance (360-664-0871 or <a href="mailto:ethics@atg.wa.gov">ethics@atg.wa.gov</a> ). Submit a copy of the Executive Ethics Board decision with this form.			
<i>*District and Educational Service District employees are not considered state employees for this purpose. As a reminder, please check with your employer regarding their outside work policies.</i>			
<b>6. I certify, under penalty of perjury as provided by the laws of the State of Washington, that all of the foregoing statements are true and correct, and that I will notify OSPI of any changes in any statement.</b>			
<b>CONTRACTOR SIGNATURE</b>		<b>DATE</b>	
<b>PRINTED NAME</b>		<b>TITLE</b>	

## EXHIBIT E PROPOSAL CHECKLIST

Please use the checklist below to ensure that you have submitted all required materials in the required format. This checklist does not need to be submitted with your proposal.

Included in Proposal	Component
<input type="checkbox"/>	Letter of Submittal
<input type="checkbox"/>	Technical Proposal
<input type="checkbox"/>	Management Proposal
<input type="checkbox"/>	Examples of previous reports/products from similar research contracts in past 10 years
<input type="checkbox"/>	References
<input type="checkbox"/>	Cost Proposal
<input type="checkbox"/>	Certifications and Assurances
<input type="checkbox"/>	Contractor Intake Form
<input type="checkbox"/>	Washington State Business License, if applicable (see Contractor Intake Form)
<input type="checkbox"/>	Small Business Self-Certification, if applicable (see Contractor Intake Form)

## **EXHIBIT F**

### **SAMPLE INTERVIEW QUESTIONS**

#### Motivation to participate

1. Thirty-one (31) districts in total joined the project; some did not remain with the project. In light of relatively small grant award and other time and resource constraints, why did your district join and persevere?
2. Why did you join the project extension? What is your team doing to enhance capacity and sustain the work?

#### Leadership and readiness

3. Looking back, how “ready” was your district to undertake this work? What would you describe as necessary readiness attributes?
4. What is the benefit of having a DPLLT? How and why did your DPLLT evolve over time?
5. If you were to talk with another state thinking about doing a statewide project like WA-TPL, what sort of guidance would you recommend?

#### Outputs

6. What was your introductory experience like, i.e., launch or orientation? How could that experience have been better prepared to support your district’s work, to better prepare your team for the project?
7. What cultural shifts have you noted in your district’s practice or policy that you would attribute to WA-TPL? How and how likely is it that these changes will be sustained?
8. WA-TPL was repeatedly referred to as being an organic, iterative project, learn as we go. What standardized deliverables may have strengthened your work?
9. What non-WA-TPL districts have you informed and/or have asked your team about this work?

#### Data

10. How did your DPLLT engage with data sources to make decisions about professional learning and support systems?
11. How valuable was the SAI to your work? Does the SAI have a place in your sustainability planning?

#### Opportunities and resources

12. How did your district use or apply various materials and resources, e.g., standards, workbooks, IC maps including the DPLLT, SAI, etc.? How did this inform your work? Which materials were particularly helpful?
13. Multiple statewide convenings, although costly, cemented commitments to success, showcased progress, generated guidance for next steps. How helpful was this to your team? In what ways did your team benefit? Any ideas to do it differently?
14. How have WA-TPL activities connected to other initiatives already underway, e.g., TPEP, student testing, discipline, dropout, performance analytics, math and science standards, etc.?

#### Outcomes

15. What were your team’s most significant project outcomes?
16. Changes in student growth are unlikely to be realized in a 2-3 year grant project. The final SPU report shows that student achievement increased in some instances correlated to WA-

TPL. What is your district's experience with the relationship between WA-TPL and increased student achievement?

17. What professional behaviors and actions are evident now due to WA-TPL that are supportive of teacher collaboration and student learning?
18. How has the WA-TPL work your team has been doing connect with initiatives and tasks your district is already doing, e.g., TPEP, discipline, testing, dropout, content area, etc.?

Support structures and processes

19. The Washington affiliate of Learning Forward (LFWA) was a significant contributor to WA-TPL. How important was a relationship with LFWA to your team? How did your district benefit by interactions with LFWA?
20. The Association of Educational Service Districts (AESD) was a significant contributor to WA-TPL. How important was ESD leadership to your team? How did your district benefit by interactions with ESDs, especially your regional ESD?
21. The coaches working with lab teams were significant contributors to WA-TPL. How important was working with a coach to your team? How did your district benefit by interactions with a coach?
22. The role of state leadership and dedicated project management was evident throughout the project. What are your impressions of project guidance OSPI provided? In what ways could it have been better?