



FLORIDA VIRTUAL  
SCHOOL

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# PROCUREMENT SERVICES

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## Request for Proposal

### Call Center & Technical Support Services

### RFP01-2001983B01-CALCNT-XXXXXX

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| Issue Date:                            | September 26, 2019                            |
| Pre-submittal Conference:              | October 9, 2019 @ 11:00 AM                    |
| Dial-In Number:                        | 407 513-7124                                  |
| Question & Answer<br>Deadline:         | October 14, 2019 @ 2:00 PM EST                |
| Bid Due Date/Time:                     | October 23, 2019 @ 2:00 PM EST                |
| Direct All Inquiries in<br>Writing To: | FLVS Procurement Services<br>Karen Stolarenko |
| Email Address                          | kstolarenko@flvs.net                          |

**NOTICE TO ALL INTERESTED PARTIES:** Sealed responses shall be received by the Procurement Department located on the 2<sup>nd</sup> Floor of 2145 Metrocenter Boulevard Orlando, Florida 32835. Florida Virtual School (FLVS) is a secured controlled building, and all hand delivered Bid and/or RFP submittals must be checked in by the FLVS receptionist. Note that receipt of response means DELIVERED AND DATE/TIME STAMPED RECEIVED IN THE PROCUREMENT DEPARTMENT. Responses delivered to the building, but not delivered to the Procurement Department and date/time stamped as received, will not be considered as received for this solicitation process. Responses must be delivered in a SEALED package with the RFP name, RFP number, and opening date/time clearly marked on the outside of the package.

Responses will not be accepted or considered after the specified time and date listed above.

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# FLORIDA VIRTUAL SCHOOL

## REQUEST FOR PROPOSAL

### Call Center Support & Technical Support Services

#### 1. OVERVIEW

- 1.1 Purpose: Florida Virtual School (FLVS), hereafter referred to as the "district" or "FLVS", is seeking responses from qualified proposers interested in providing Customer Services and Technical Support Call Center Services. The recommended award will be to the most qualified proposer(s) as determined by an evaluation committee. The final award will be based on Board approval (if total value is \$100,000 or more) or Procurement Director approval (if total value is less than \$100,000).
- 1.2 District Profile: Florida Virtual School is a statewide public-school district providing elementary, middle and high school courses to Florida residents. All of our courses are fully online. FLVS (the district) is accredited as a system by Advanced Education, Inc. (AdvancedEd) and various FLVS schools are accredited by SACS CASI (Southern Association of College and Schools Council on Accreditation and School Improvement). Our courses meet the Florida Standards. As a school of choice, all public institutions within Florida must provide Florida families the option to choose FLVS for their courses. FLVS Global was created in 2000 by the Florida Legislature as the national and international arm of FLVS. As a not-for-profit institution, FLVS reinvests revenue from FLVS Global into the research and development of new educational technologies and the creation of the highest-quality courses, benefiting students in Florida and beyond.
- 1.3 Student Enrollment
  - 1.3.1 FLVS Enrollments: FLVS annually serves more than 200,000 students who successfully complete more than 470,000 semester enrollments. We are projecting to serve more than 500,000 successful completions in the coming years.
    - a. FLVS Full Time is a diploma granting school with standardized state testing that follows a traditional public-school schedule and pace.
    - b. FLVS Flex does not operate on a fixed calendar. FLVS courses are designed for semester-based terms. Since time is not a constant in our online courses, students have flexibility of pace.
  - 1.3.2 Students can enroll in one or multiple courses at a time throughout the year as part of an open and rolling enrollment process. An enrollment in FLVS terms is a half credit in traditional terms. We do not differentiate between students taking a full-year course that is one full credit (or two half-credit enrollments) from a student that is taking two half credit courses (or two half-credit enrollments). One student could be active in six concurrent half-credit enrollments at one time.
- 1.4 Teachers: FLVS Teachers: Currently our instructional staff totals ~ 1,500 and we have a total of ~ 8,800 active classrooms in the system.
- 1.5 Prior to describing the statement of work, the following section shall provide an overall description of the contract scope, operational structure and pricing.

1.5.1 Contract Services, Structure, Term, Sequence and Pricing: FLVS shall enter into a "single contract" with a "single prime Proposer" or multiple proposers as deemed to be in FLVS's best interest for all services as described under this RFP. It is the responsibility of the Proposer to partner as necessary and assemble the team, skills, assets and other qualifications to meet all requirements as laid out in the RFP. The selected Proposer shall assume all contractual responsibilities, obligations and comply with all contract terms and conditions.

1.5.2 Scope of Work: The scope of work under this contract is specified in Section 8 of this RFP.

a. Contract Structure: The Master Service Agreement (MSA) is the first Agreement that shall be exercised for *Five* years with *five (5)* one year renewals as directed by FLVS. The Services SOW shall be exercised at FLVS discretion and shall have a term that does not exceed 12 months from the MSA expiration date. Separate and individual Scopes of Work (SOW) may be issued that are specific to the needs of the project.

1.5.3 Contract Pricing: Contractors shall provide pricing as required on the proposal price sheet. Alternate price structures may be submitted in addition to the pricing requested. FLVS reserves the right to reject proposals that do not comply with the information requested on the proposal price sheet.

## **2.0 EVALUATION OF RESPONSES**

Responses shall be reviewed and evaluated by the Proposal Evaluation Committee as described herein.

### **2.1 Proposal Evaluation Committee (PEC)**

2.1.1 A Proposal Evaluation Committee shall convene, review, evaluate and rank all valid responses submitted based on the evaluation criteria. The PEC committee shall consist of FLVS staff members or non-staff members assigned to the committee who are voting members and non-voting subject matter experts (SMEs). The non-voting members will be reviewing the proposals and reporting in their field of expertise to the committee.

2.1.2 The Proposal Evaluation Committee reserves the right to interview any, all or none of the Proposers that responded to the RFP and to require at the discretion of FLVS formal presentations with the key personnel who shall administer and be assigned to work on behalf of the contract before recommendation of award.

2.1.3 The Proposal Evaluation Committee reserves the right to conduct site visits of a Proposer's facilities and/or of a current project they are managing.

2.1.4 Public Notice of Proposal Evaluation Committee meetings will be posted on FLVS Procurement Services website <https://flvs.net/about/procurement-opportunities/solicitations-open>

### **2.2 Evaluation Process**

2.2.1 The selection process to evaluate the responses under this RFP shall be conducted in accordance with the evaluation procedure as described in this section. Accepted Responses shall be evaluated by the PEC comprised of FLVS staff or non-staff members assigned to the committee. FLVS shall be the sole judge as to which response is best and, in ascertaining the best response, shall take into consideration the financial resources, reputation, fit of proposed solution, and experience in performing similar work,

as generally described below. FLVS will use 1) A minimum Qualifications/Responsiveness Check and 2) a two-step process (written and oral steps).

2.2.2 FLVS shall generally follow the above shown process; in doing so, FLVS at its will, reserves, at a minimum, the following rights:

- a. The award shall be made to the Proposer that best meets FLVS needs. Every response shall be reviewed/evaluated in terms of its conformance to the RFP specifications;
- b. All responses properly completed and submitted shall be accepted by FLVS. However, FLVS reserves the right to reject any or all responses, reject any response that does not meet all mandatory requirements, or cancel this RFP according to its best interest;
- c. FLVS also reserves the right to waive minor irregularities in responses if that action is in the best interest of FLVS. If the Proposer is awarded the contract, such a waiver shall in no way modify the requirements stated in this RFP or excuse the Proposer from full compliance with the specifications stated in this RFP or resulting contract;
- d. FLVS reserves the right, before awarding the contract, to require Proposer to submit additional evidence of qualifications or any other information the District may deem necessary;
- e. FLVS reserves the right to further negotiate any response, including price, with the highest rated Proposer. If a contract cannot be reached with the highest rated Proposer, the District reserves the right to negotiate and recommend award to the next highest Proposer or subsequent Proposers until a contract is reached;
- f. FLVS shall not be under any requirement to complete the evaluation by any specific date and reserves the right to suspend or postpone the evaluation process would the need arise due to budget constraints, time constraints or other factors as directed by FLVS;
- g. FLVS, at its sole discretion may waive the requirement to have demonstrations or interviews and may determine an award based on steps as defined.
- h. FLVS, at its sole judgment, will award or reject any or all responses as is in the best interest of FLVS and the decision shall be final.

## 2.3 Evaluation Steps

2.3.1 Response Opening: Response submittals shall be received and publicly opened. Only the names of Proposers will be read at this time.

2.3.2 Responsiveness to Submittal Requirements: A preliminary evaluation by Procurement Services shall determine whether each received response is complete and compliant with the minimum qualifications and all other instructions and/or submittal requirements in the RFP. Any responses that are incomplete or that do not comply with the instructions and /or submittal terms and conditions may be rejected and excluded from further consideration or taken into consideration during the scoring. Contractor responses, which are compliant as determined solely by FLVS, are moved to Step 1 of the evaluation stage.

2.3.3 Step 1: In this stage, FLVS shall evaluate each written response based on the evaluation criteria listed in 3.0, using a 1-20 rating system multiplied by the weights assigned. This is a public meeting.

Step 1a: The proposal evaluation committee members will discuss all contractor responses, and each evaluation committee member will score the contractors individually. Additionally, the Procurement Representative will send each individual member an Evaluation Committee Rules form to sign as acknowledgment of the committee member's understanding of the requirements. The form specifies, "Each member will conduct, and complete, an individual evaluation of each response." Each member of the PEC will first score each contractor's written response. The procurement representative will combine the weighted evaluation scores from each committee member to finalize total weighted scores for each contractor.

Step 1b: The procurement representative will combine the evaluation scores submitted by all PEC members and shall determine the highest scoring contractors based on the total evaluation scores received. FLVS reserves the right to determine the cutoff score and the number of responses that may advance to Step 2. Step 2 is optional at the sole discretion of FLVS. If FLVS determines that Step 2 is not required, award recommendation will be made based on the scores from Step 1.

2.3.4 Optional Step 2: In this stage, the finalists shall be notified by Procurement Services of the process for the system demonstration and/or oral presentation based on interviews. Step 2 evaluation is a "fresh evaluation" with scores from Step 1 not being carried forward. Only the scoring session shall be a public meeting.

The finalists and their sub proposers may be required to appear (face to face), in no order before the PEC for a system demonstration and/or oral presentation/interview of their response and detailed discussion of the elements of their response;

- a. Procurement Services will assign the date for the on-site demonstrations and/or oral presentations based upon a random drawing of the responses advanced to Step 2;
- b. The PEC may require the finalists to furnish additional information or respond to questions and/or clarifications prior to or at the oral demonstration/interview;
- c. FLVS may require finalists to provide login or access for testing systems if applicable as directed;
- d. FLVS reserves the right to invite additional subject matter experts from FLVS and/or its representatives to attend oral demonstrations/presentations;
- e. Following the oral demonstrations/oral presentations, FLVS may require finalists to furnish additional information or respond to questions and/or clarifications. May require additional public meeting(s).
- f. Using the evaluation criteria in Section 3.0, each member of the PEC will separately score each contractor's system demonstration/oral presentation using a 1-20 rating system multiplied by the weights assigned. The procurement representative will combine the weighted evaluation scores from each committee member to finalize total weighted scores for each contractor to determine highest ranking. The ranking shall be determined by the highest weighted score.
- g. Procurement Services will post an Intent to Award Notice within approximately two weeks from finalist selection.

2.3.5 Basis of Award: Recommended award shall be made to the highest ranked Contractor whose response is determined in writing to be the most advantageous, bringing "best value" to meet the criteria of FLVS. FLVS reserves the right to make awards by

individual item, group of items, all or none or a combination thereof; to reject any and/or all Bids or to waive any minor irregularities or technicalities. All purchases are contingent upon district funding. Following the selection and upon final negotiation of the contract terms and conditions with the top ranked Contractor, recommendation for contract award will be submitted to FLVS Board of Trustees (if total value is \$100,000 or more) or Procurement Director approval (if total value is less than \$100,000. The final award will be based on Board approval.

The Executive Team at their sole discretion shall accept or reject all recommendations of the Evaluation Committee. If the Executive Team accepts the Evaluation Committee's recommendation, the process continues as noted in each step above. If the Executive Team rejects any Evaluation Committee's recommendation, the Executive Team at their sole discretion, shall proceed with any of the following methods: directing the Procurement Representative to recommence the selection ranking process at whatever state or step the Executive Team deems appropriate (including step 1, step 2, and/or step 3); pursuing the project by any other alternative method permitted under Florida law; or abandoning the project all together. If the Executive Team elects to pursue the project through an alternative method or abandon the project all together, FLVS shall provide public notice of that decision.

2.3.6 FLVS reserves the right to negotiate price and contract terms and conditions with the most qualified firm(s) to provide the requested service.

2.3.7 Selection Criteria: This procurement will comply with applicable Board Policies, State Board Rules, and Florida Statutes. The selection of a firm may be made without discussion with Proposer(s) after responses are received. Therefore, responses should be submitted complete with all pertinent information.

- a. No Proposer shall have any rights against FLVS arising from such negotiations.
- b. There will be no interim briefing regarding the status of a particular response until the evaluation of all responses is complete.

## 2.4 Evaluation Criteria

2.4.1 The evaluation table below shows the evaluation criteria for both steps. These criteria shall be used through the evaluation process as described subsequently:

| Criteria No. | Step 1: Main Criteria Description  | Weight      |
|--------------|--|-------------|
| 1.           | Compliance   | 10%         |
| 2.           | Qualifications and Experience of Similar Size and Scope and Letters of Reference | 19%         |
| 3.           | Contractor Methodology   | 20%         |
| 4.           | Respondent Questionnaire and Ability to Meet or Exceed the Stated Requirements   | 30%         |
| 5.           | Price Proposal   | 20%         |
| 6.           | Acceptance of Invoice Payments via FLVS Visa Purchasing Card                     | 1%          |
|              | <b>TOTAL</b>   | <b>100%</b> |

#### 2.4.2 Respondent Interview/Demonstration Criteria

| Criteria No. | Step 2: Main Criteria Description  | Weight      |
|--------------|--|-------------|
| 1.           | Ability to Demonstrate How Contractor Meets or Exceeds the Scope of Services | 75%         |
| 2.           | Additional Value-Added Services  | 25%         |
|              | <b>TOTAL</b>   | <b>100%</b> |

#### 2.5 Schedule/Project Timeline

| Scheduled Date    | Event Description   |
|-------------------|---|
| See Cover Sheet   | Pre-Submittal Meeting   |
| See Cover Sheet   | Last Day to Request Additional Information or Clarification           |
| See Cover Sheet   | Response Due Date   |
| October 30, 2019  | Step 1 Evaluation Committee Meeting Tentative Date                    |
| November 13, 2019 | Step 2 Oral Interviews/Demonstration Committee Meeting Tentative Date |
| November 15, 2019 | Notice of Intent to Award Date (Tentative)                            |
| November 19, 2019 | Negotiations Tentative Date   |
| January 29, 2020  | Award Date Tentative Date   |

### 3. RESPONSE SUBMISSION FORMAT AND INFORMATION THAT MUST BE SUBMITTED

3.1 In order to maintain comparability and consistency in review and evaluation of responses, all responses shall be organized as specified below. Avoid any elaborate promotional materials and provide only information that is required. All supporting materials should clearly reference the portion of the RFP to which they pertain. Submit **one (1)** unbound original (clearly marked as such) and four (4) exact duplicates for a total of five (5) physical copies. **Responses must be bound in a three ring binder** (with the exception of the unbound original). **Two electronic copies on USB flash drive are also required** for document management purposes. **The first electronic copy MUST be scanned as a single document** (scan the entire response and save it as **one (1) contiguous .pdf**). The second electronic copy shall be the **redacted version also scanned as a single document** (see public records Attachment 8). Responses not meeting the requirements below may be determined to be non-responsive, non-responsive responses will receive no further consideration.



- a. Table of Contents: Clearly outline and identify the material and responses by tab and page number. Outline in sequential order the major areas of the response, including enclosures. Tabs should be used to separate each tabbed section. All pages must be consecutively numbered and correspond to the table of contents.
- b. **Tab 1 – Compliance:** Cover Letter and Compliance Information: Provide a cover letter indicating your company’s understanding of the requirements/scope of services of this specific response. The letter must be a brief formal letter from the Proposer that provides information regarding the company’s interest in and ability to perform the requirements of this RFP. Clearly demonstrate your familiarity with the RFP. Unless specific exceptions are noted in the response to this package, all terms and conditions contained in the response to include the inclusive sample contract are considered to be accepted by the proposer. The prospective Proposer hereby certifies, by submission and signature of this letter, represents complete and unconditional acceptance of the requirements, terms and conditions of this solicitation and all appendices and any Addendum released hereto. Cover letter shall be signed by authorized principal party.
  - i. Authorized parties and contact information required: For each of the following provide a full list of names, titles, addresses, telephone numbers, and email addresses:
    1. Primary Contact: Point of contact for solicitation process and contracting purposes.
    2. Principals and authorized signatures: Person(s) or entities serving or intending to serve as principals, authorized to legally commit the Proposer’s organization to perform the services.
- c. Compliance and Qualifications Checklist: All respondents must complete the compliance checklist and attach page directly following the cover letter (Appendix K).
  - 3.1.1 Include under this tab the following signed forms (An original form and signature is required. **These forms must not be modified in any manner.**).
 

|  |  |
|--|--|
| <ol style="list-style-type: none"> <li>i. Contractor’s Statement of Qualifications (Appendix A)</li> <li>iii. Statement of Affirmation and Intent (Appendix C)</li> <li>v. Addenda Form / Dispute Resolution Clause (Appendix E)</li> <li>vii. Fair Labor Act / Public Crimes / Federal Debarment Certifications (Appendix F)</li> <li>ix. Insurance Certificate (See Section 6.18)</li> <li>xi. Anti-Lobbying Certification (Appendix I)</li> </ol> | <ol style="list-style-type: none"> <li>ii. Acknowledgement of Business Type (Appendix B)</li> <li>iv. Mutual Non-Disclosure Agreement (Appendix D )</li> <li>vi. Drug Free Workplace Certification (Appendix G)</li> <li>viii. Public Records Act/Chapter 119 Requirements (Appendix H)</li> <li>x. Compliance Worksheet (Appendix J)</li> <li>xii. Compliance Checklist (Appendix K)</li> </ol> |
|--|--|

3.1.2 Type of Business (Refer to Appendix B): The Proposer shall identify the type of business entity involved (e.g.; sole proprietorship, partnership, corporation, joint venture, etc.) The Proposer shall identify whether the business entity is incorporated in Florida, another state, or a foreign country. Indicate years in business; changes in ownership; bank reference; and other information to verify financial responsibility.

- a. If the Proposer is a corporation, provide a copy of the certification from the Florida Secretary of State verifying Proposer's corporate status and good standing, and in the case of out-of-state corporation, evidence of authority to do business in Florida.
- b. Provide the Federal Employer Identification Number of the Proposer. In the case of a sole proprietorship or partnership, provide the Social Security numbers for all owners/partners.
- c. License Sanctions: List any regulatory or license agency sanctions. The Board may perform a background check on Proposer with all state and regulatory agencies.

3.1.3 Drug-Free Workplace: If applicable, provide a statement concerning the Proposer's status as a Drug-Free Work Place. (Reference Appendix G) Responses received which are equal with respect to price, quality, and service and that have provided proper certification that a business has implemented a drug-free workplace program, shall be given preference in the award process.

3.1.4 Conflict of Interest Statement: See "Statement of Affirmation and Intent" (Refer to Appendix C and Section 5.1.1) included in this package

3.1.5 In order to be considered for award, Proposer must demonstrate financial stability to FLVS. Proposer must provide at a minimum a Statement from a Certified Public Accountant certifying the firm's financial stability including information as to current or prior bankruptcy proceedings. The letter shall include current ratio, cash ratio, quick ratio, debt-equity ratio, debt to capital ratio and debt to asset ratio and return on assets (ROA).

FLVS as its sole discretion may request at any time during the evaluation or contracting process a Dun & Bradstreet (D&B) Supplier Evaluation Report (SER) and / or Certified Financial Statements (Copy of audited financial statement for each of the last three years, by an independent certified public accounting firm or Federal Tax Return for previous years).

All costs associated with this report shall be borne by Proposer.

3.1.6 Accessibility Requirements: Respondent shall provide information demonstrating compliance or the plan to become compliant with the Americans with Disabilities Act (ADA) in accordance with federal, state and local disability rights legislation in accordance with WCAG 2.0 and 508 Accessibility Standards. Respondent shall provide reports that demonstrate compliance including planned and active process improvements toward compliance and active remediation plans currently in progress.

The respondent shall provide the following accessibility information:

- a. A completed Accessibility Conformance Report (ACR) based on the Voluntary Product Accessibility Template (VPAT)(templates and information available at <https://www.itic.org/policy/accessibility/vpat>). If Respondent has not progressed with their Accessibility Compliance implementation to the point where they can provide the ACR information a copy of the existing internal plan must be provided.
- b. If the ACR list items that include “partially supports” or “does not support”, respondent shall provide documentation indicating an intent to remediate including a timeline for remediation Supplemental Accessibility Report (SAR) containing the following:
  - Description of the evaluation methods used to produce the ACR to demonstrate due diligence in supporting conformance claims
  - Documentation of features that help achieve accessibility and usability for persons with disabilities;
  - Information on core functions that can’t be used by persons with disabilities;
  - Information on how to configure and install the Information and Communication Technology (ICT) item to support accessibility; and
  - Information on how the ICT item enables the creation of accessible electronic content that conforms to the Revised 508 Standards, including the range of accessible user interface elements the tool can create (only required for authoring tools that generate content, i.e. documents, reports, videos, multimedia, web content, etc.)
- c. In addition to the required accessibility information, the respondent may also provide the following for consideration:
  - Results of independent accessibility audits
  - Public accessibility policy and statements

**3.1 Tab 2 – Qualifications, Experience of Team Members and Letters of Reference:**

Summarize the qualifications of the Proposer. Where the project team includes sub-contractors or sub-consultants, qualifications of the proposed sub-contractors or sub-consultants shall also be provided. Past working relationships on similar projects should be indicated. Provide the credentials of the individual(s) from your company that will administer the day-to-day operations of FLVS contract.

**3.2.1 Background - Provide a profile of your organization:**

- a. Where are your corporate offices located? Include physical address for Call Center facilities.
- b. Do you have any offices in Central Florida, Orlando, and any contiguous county to Orange County?
- c. List the number of years your company has been in operation.
- d. Describe your support and quality assurance resources.
- e. Company website
- f. Number of clients: Active and Inactive.
- g. List the number of Active clients by year, within the past five (5) years. List the number of clients who are no longer using your services by year, within the past five (5) years.

- 3.2.2 Experience - Describe your company's experience with the services specified. Provide details/examples as well as quantifiable results and objectives achieved as a partner with specific clients (3 client case studies).
- a. Describe what strategic advantages your organization brings to the relationship of our organization?
    - i. Skills
    - ii. Strengths
  - b. Describe awards won or achieved related to your services including dates.
  - c. Describe how your organization is organized and staffed to support the required services in the scope of work.
  - d. Identify key personnel and provide biographical information pertaining to their backgrounds, expertise and job descriptions. Provide an organizational chart.
  - e. How would this team be organized to service our organization?
  - f. Does your company have dedicated resources with a knowledge base around the educational sector?
    - i. Who
    - ii. Biographies
    - iii. Job Description

- 3.2.3 References: Provide **three (3) written letters of reference** (preferably educational or similar references). Proposers shall be required to sign the form in Section 10 giving FLVS authorization to contact and check previous performance on projects.

Include name of customer, address, contact name, telephone numbers (including facsimile number), and email address. Include only references within the previous thirty-six (36) months. FLVS will contact these references during the evaluation process. Non-responsive references may reflect negatively on the contractor.

Each Proposer should also include under this tab, in tabular form, summary information for all contracts of similar size and scope performed by the Proposer, or team, within the past five (5) years. Information provided for each job shall include:

- a. Contract/Project name/Description
- b. Agency/department/office for which performed
- c. Dates of the contract
- d. Owner's contact/project manager or other representative
- e. Description of role and level of involvement
- f. Contact person
- g. Dollar value of the contract
- h. Present status of the engagement.
- i. The firm's key professionals involved on the engagement and who of that staff would be assigned to the program covered by this RFP

FLVS reserves the right to contact any and all references and to obtain, without limitation, information on the Proposer's performance on the listed jobs.

### 3.3 **Tab 3 - Respondent Methodology:**

#### 3.3.1 Respondent Methodology

- a. Describe plan for performing the work specified. For each of the required services identified in the scope of services, describe how your firm will accomplish each activity. Include practices, methods, and processes that determine how best to plan, develop, control and deliver the work specified until successful completion.
- b. Discuss overall communications methodology for communicating to key target audiences/stakeholder groups such as project team members, users, and external (resident and contractor) community.
- c. Define the expectations that you have of your clients.
- d. Describe any additional value-added services that contractor is proposing.

#### 3.3.2 **Staffing Plan:** Proposers are required to submit a staffing plan, including a listing of all sub-contractors, if applicable, and a description of the project team roles. The submission shall incorporate the following:

- a. Organization chart showing FLVS and Proposer staff, role descriptions, and a description of the correlation between FLVS and Proposer roles.
- b. Roles and Responsibilities: describe the Proposer's role and the expected FLVS's role for this project.
- c. Resource Risk Mitigation: Provide plans for resources on the project in the event a resource leaves the firm prior to completion of contract.
- d. Describe in detail how the Proposer's team shall be organized; identify the relationships with among all the key personnel. Include single point of contact for FLVS.
- e. Describe in detail how the Proposer plans to allocate responsibilities/lead roles and work for the various tasks

### 3.4 **Tab 4 – Proposer Questionnaire and Requirements Tables**

3.4.1 All respondents must complete the Respondent Questionnaire provided in Section 8.2. A. Provided detailed responses to each item listed.

3.4.2 Respondents shall complete the Minimum Requirements table confirming that they will meet or exceed each of the stated requirements listed in Section 8.2.B. All items included with a response of "YES" shall be included in the respondents proposed cost. The responses will be used in the evaluation process.

### 3.5 **Tab 5 – Cost Proposal**

3.5.1 Proposers shall submit their cost according to the format provided in Section 9- Price Proposal. Completion of the Price Proposal form is required. Alternative pricing may be offered in addition (not as a replacement) to the pricing structure requested. Do not cite price anywhere else in the submission.

3.5.2 FLVS reserves the right to contact Proposers on price and scope clarification at any time throughout the selection process and negotiation process.

3.5.3 All work will be performed remotely at Respondent appointed facilities. The Respondent is responsible for providing appropriate work environment including high-speed internet connectivity to appointed staff for the duration of this project. There will be no travel included in this project.

3.5.4 The cost response shall have the following distinct components:

- a. The first component is a deliverable-based fixed-cost for services based upon a “per-contact” cost as well as costs associated with training and implementation (Section 9.1). This section must be completed as specified and shall be used for evaluation purposes.
- b. The second component, (Section 9.2) may be used to provide alternative pricing structures.
- c. The third component, to be used for additional services optional services (Section 9.3).

3.6 **Tab 6 – Acceptance of Invoice Payments via FLVS Visa Purchasing Card**

State whether or not the Proposer will accept 100% payments via the FLVS Visa Purchasing Card. No additional charges, fees or price increases may be assessed by the contractor for the use of Procurement/Charge/Bank cards during the life of any award resulting from this contract, and any applicable extensions (Section 9.4).

#### 4. SUBMISSION REQUIREMENTS

##### **Notice to Proposers:**

You are cautioned to write all descriptions and prices in a legible manner so that there will be no doubt as to the intent and scope of your response. No oral, telegraphic (facsimile/scanned), telephone responses or modifications to responses, will be accepted. See cover for instructions.

Responses will not be accepted or considered after the specified time and date listed on page 1.

**Each Response envelope/box shall be sealed and identified as specified below:**

**FILL OUT THE LABEL BELOW AND ATTACH IT TO YOUR RFP REPLY PACKAGE(S).**

*Cut out label and tape to outer sealed envelope(s) or package(s).*

|  |   |
|--|---|
| <b>DO NOT OPEN - SEALED RESPONSE - DO NOT OPEN</b> |   |
| <b>RFP NO.:</b> RFP01-2001983B01-CALCNT-XXXXXX     | <b>RFP Title:</b> Call Center Support & Technical Support Services  |
| <b>TO BE OPENED:</b> 2:00 PM EST, October 23, 2019 |   |
| <b><u>LATE RESPONSE WILL NOT BE ACCEPTED</u></b>   |   |
| <b><u>FROM</u></b>                                 |   |
| Name of Firm:                                      |   |
| Contact Name:                                      | Email Address:  |
| Telephone No.:                                     | Fax No.:  |
| <b>Deliver To:</b>                                 | <b>Florida Virtual School<br/>Procurement Services<br/>Attn: Karen Stolarenko, Senior Buyer<br/>2145 Metrocenter Boulevard, Suite 100<br/>Orlando, FL 32835</b> |

4.1 Non-Submittal Response Form - If your company is not submitting a response to this solicitation, complete and email this form prior to the due date established in the RFP document. If you are submitting this form, then only this form needs to be returned, do not return the entire RFP package. This information will assist Procurement Services in the preparation of future solicitations.

**RFP NO.: RFP01-2001983-CALCNT-XXXXXX**

**RFP NAME: Call Center Support Services**

**Attention: Karen Stolarenko, Senior Buyer**

**Email: kstolarenko@flvs.net**

**Company Name:** \_\_\_\_\_

**Contact Person Name & Title:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Telephone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Check reason for a “no bid.”**

Specifications “too tight”, geared toward one brand or manufacturer (explain below)

\_\_\_\_\_

Insufficient time to respond.

\_\_\_\_\_

Specifications unclear (explain below)

\_\_\_\_\_

We do not offer this product/service or an equivalent.

\_\_\_\_\_

Our schedule does not permit us to perform

\_\_\_\_\_

Unable to meet specifications

\_\_\_\_\_

Unable to meet bond requirements

\_\_\_\_\_

Unable to hold prices firm throughout the term of the contract period

\_\_\_\_\_

Unable to meet insurance requirements

\_\_\_\_\_

Other, explain

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_



## 5 INSTRUCTIONS TO PROPOSER

- 5.1 **Upon the issuance of this RFP, all contact with FLVS must be made through the procurement representative named on the first page.** The Proposer must limit communication with the designated contact to the means specified in this document. Other employees and representatives of FLVS and the participating agencies are instructed not to answer questions regarding the RFP or otherwise discuss the contents of the RFP with the Proposer or its representatives. Any contacts made with other employees and representatives of FLVS will be reported and forwarded to Procurement. Proposer shall not, under the penalty of law, offer any gratuities, favors or anything of monetary value to any officer or employee of FLVS in connection with this competitive procurement.
- 5.2 Proposer to this Response or persons acting on their behalf are specifically requested not to contact Board of Trustees, members, staff, or Committee Members during the course of the Response and Selection process. All procedural matters shall be directed to Procurement/Contract Specialist. Evaluation Committee members or other School employees shall not be contacted or approached by representatives of any potential Proposer to this RFP. Contact or communication initiated by any responding firm may result in rejection of the Response.
- 5.3 Upon award recommendation or thirty (30) days after opening, whichever is earlier, any material submitted in response to this RFP will become a public record and shall be subject to public disclosure consistent with Chapter 119, Florida Statutes (Public Records Law). Proposers must claim the applicable exemptions to disclosure provided by law, in their response to the RFP, by identifying materials to be protected and must state the reasons why such exclusion from public disclosure is necessary and legal. FLVS reserves the right to make any final determination of the applicability of the Public Records Law.

### 5.3.1 Redacted Submissions

If Proposer considers any portion of the documents, data or records submitted in response to this solicitation to be confidential, proprietary, trade secret or otherwise not subject to disclosure pursuant to Chapter 119, Florida Statutes, the Florida Constitution or other authority, Proposer shall mark the document as "Confidential" and simultaneously provide a separate redacted copy of its response and briefly describe in writing the grounds for claiming exemption from the public records law, including the specific statutory citation for such exemption. This redacted copy shall contain the solicitation name, number, and the Proposer's name on the cover, and shall be clearly titled "Redacted Copy." The Redacted Copy should only redact those portions of material that the Proposer claims is confidential, proprietary, trade secret or otherwise not subject to disclosure.

In the event of a request for public records pursuant to Chapter 119, Florida Statutes, the Florida Constitution or other authority, to which documents that are marked as confidential are responsive, FLVS shall provide the Redacted Copy to the requestor. If a requestor asserts a right to the Confidential Information, the Department shall notify the Proposer such an assertion has been made. It is the Proposer's responsibility to assert that the information in question is exempt from disclosure under Chapter 119, Florida Statutes, or other applicable law. If FLVS becomes subject to a demand for discovery or disclosure of the Confidential Information of the Proposer in a legal proceeding, FLVS shall give the Proposer prompt notice of the demand prior to releasing the information (unless otherwise prohibited by applicable law). The Proposer shall be responsible for defending its

determination that the redacted portions of its response are confidential, proprietary, trade secret, or otherwise not subject to disclosure.

By submitting a bid, the Proposer agrees to protect, defend, and indemnify FLVS for any and all claims arising from or relating to the Proposer's determination that the redacted portions of its reply are confidential, proprietary, trade secret, or otherwise not subject to disclosure. If Proposer fails to submit a redacted copy of information it claims is confidential, FLVS is authorized to produce the entire documents, data, or records submitted in answer to a public records request for these records.

- 5.4 Posting of Tabulations/Recommendation. RFP tabulations with recommended awards will be posted for review by interested parties. Visit <http://www.demandstar.com> or <https://www.flvs.net/about/procurement-opportunities/solicitations-open> for bid/response links and in the Procurement Services Department, at 2145 Metrocenter Boulevard, Suite 100, Orlando, FL 32835. Results will remain posted for a period of 72 hours. Failure to file a Notice of Intent to Protest within the time prescribed in Section 120.57(3) b, Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes. If the tabulation with the recommendation of award is not posted by said date and time, Procurement Services will endeavor to post a "Notice of Delay of Posting" to inform all Proposer of the delay and anticipated posting date and time.
- 5.5 Bid Protests: Any person who believes they are adversely affected by any specification in this Bid or RFP or any decision or intended decision concerning this Bid or RFP and who wishes to protest such specification, decision, or intended decision shall file a Notice of Intent to Protest in accordance with section 120.57(3), Florida Statutes. A formal written protest must be accompanied by a bond payable to FLVS in an amount equal to one percent (1%) of the total value of the proposed contract. Security shall be in the form of a bond, a cashier's check, or money order. Failure to file a protest within the time prescribed in section 120.57(3), Florida Statutes, or failure to post the bond or other security within the time frame set forth in section 287.042(2)(c), Florida Statutes, shall constitute a waiver of proceedings under Chapter 120, Florida Statutes.
- 5.6 Any Proposer in doubt as to the true meaning of any part of this RFP or related documents may submit a written request for clarification to the Buyer (see cover sheet) no later than the date and time specified on the cover. Any interpretation to a Proposer shall be made only by amendment duly issued. All Amendments will be posted and disseminated on the following web-sites:
- Demandstar (<http://www.demandstar.com>)
  - Florida Virtual School Procurement Opportunities  
<https://flvs.net/about/procurement-opportunities/solicitations-open>
- 5.6.1 Prior to submitting the response, it shall be the sole responsibility of each Proposer to determine if addenda were issued and, if so, to download such addenda from Demandstar or FLVS.net for attachment to the response (**Appendix E**).

**NOTE:** If you download a copy of this response from Demandstar you will be notified by Demandstar (as you listed, email or fax) of postings during the life of this solicitation. **You will not be notified if your downloaded a copy of this response from FLVS.net.**

- 5.6.2 All questions must be in writing and emailed to the Buyer (see cover sheet).
- 5.7 Any corrections or amendments will be posted as addenda issued no later than five (5) days prior to the response due date. Proposers should not rely on any statements other than those made in this RFP or written response to questions and/or addendum to this RFP. Where there appears to be a conflict between the RFP and any addenda issued, the last addendum issued will prevail.
- 5.8 All responses must be prepared and submitted in accordance with the instructions provided in this RFP. Each response received will be reviewed to determine if the response is responsive to the submission requirements outlined in the RFP. A responsive response is one that follows the requirements of the RFP, includes all documentation, supporting exhibits, is of timely submission, and has the appropriate signatures as required on each document. Failure to comply with these requirements may deem your response non-responsive.
- 5.9 FLVS will receive sealed responses until the date and time indicated on this response cover page. Responses must be delivered to the Procurement Services Office at the stated address and will be recorded at the stated date/time. Responses must be delivered in sealed envelopes, clearly marked on the outside as to response name, response number, and opening date by using the provided label (see Section 4). **Responses received in unidentifiable envelopes are sent at the Proposer's risk. Responses received after the date/time indicated on the response cover will be date/time stamped received and returned to the Proposer unopened.** It will be the Proposer's responsibility to get the response to the correct location and on time. Note that the official clock, for the purpose of receiving responses, is located in the Procurement Services Division.
- 5.10 Purchase Order: The award of the response shall not constitute an order. Before any shipments are made or services rendered, Proposer must receive a purchase order. Shipments shall be made as specified on the purchase order, conforming to the response form, specifications, and general instructions.
- 5.11 Conflict of Interest
- 5.11.1 No contract for goods or services shall be made with any business organization other than governmental agencies in which any of the following apply:
- a. The CEO/President or a member of the Board of Trustees has any financial interest whatsoever
  - b. A spouse or child of the CEO/President or a member of the Board of Trustees has an employment relationship or a material interest as defined by Section 112.312(15), Florida Statutes
  - c. An employee of the district has a material interest as defined by Section 112.312.(15), Florida Statute, unless the contract is based upon a competitive bid and the employee has not, directly or indirectly, participated in the development of bid specifications or in the recommendation for purchase or award
- 5.11.2 No employee or official of the Board of Trustees shall use bid prices or school prices or receive any other preferential treatment in the making of personal purchases. Neither shall any employee or official make purchases for personal use through the school or the school district. Nothing contained herein shall be deemed to prohibit

an employee from participating in activity or purchasing program that is publicly offered to all employees of the district.

- 5.11.3 Any violation of any provision of this subsection by an employee of the district shall be grounds for disciplinary action that could include dismissal.
- 5.11.4 No employee shall be the approver or initiator of purchases from any business organization in which a family member is the point of contact, the person performing the work, or works for the business organization. In this situation, the employee is required to recuse themselves from participating directly or indirectly in the procurement process.

## 6 GENERAL TERMS AND CONDITIONS

- 6.1 FLVS may, at its sole and absolute discretion, reject any and all, or parts of any and all responses; re-advertise this RFP; postpone or cancel, at any time, this RFP process; or waive any irregularities in this RFP, or in the responses received as a result of this RFP. FLVS also reserves the right to request clarification of information from any Proposer.
- 6.2 All expenses involved with the preparation and submission of responses to FLVS, or any work performed in connection therewith, shall be borne by the Proposer. No payment will be made for any responses received, any other effort required of or made, or expenses incurred by the Proposer.
- 6.3 FLVS may require the Proposer to give oral presentations in support of their response or to exhibit capabilities to support their response. Proposers will be notified of the date(s) and time(s) of any such oral presentations, if needed.
- 6.4 FLVS has implemented a Purchasing Card Program to streamline our procurement process.
  - 6.4.1 By making purchases with the Visa Purchasing Card, we can more effectively control our procurement activities and achieve a significant cost savings over our current paper purchasing/payment system. Our Awardees also achieve cost saving results by accepting our Purchasing Card.
  - 6.4.2 FLVS may, at their sole option, elect to make payment by use of a Purchasing/Bank/Charge card. No additional charges, fees or price increases may be assessed by the contractor for the use of Procurement/Charge/Bank cards during the life of any award resulting from this contract, and any applicable extensions.
- 6.5 This RFP and the related responses of the selected Proposer(s) will constitute the basis of the formal contract between the Proposer(s) and FLVS. No modification of this RFP, except by addendum issued by FLVS, shall be binding on FLVS.
- 6.6 It is understood and agreed between the parties hereto that FLVS shall be bound and obligated hereunder only to the extent that the funds shall have been appropriated and budgeted for the purpose of this RFP. In the event funds are not appropriated and budgeted in any fiscal year for payments due under this RFP, FLVS shall immediately notify Awardee(s) of such occurrence and this RFP shall terminate on the last day of the fiscal year for which an appropriation(s) was (were) received without penalty or expense to FLVS of any kind whatsoever.
- 6.7 The awards made pursuant to this RFP are subject to the provisions of Chapter 112, Florida Statutes. All Proposers must disclose, with their response, the name of any officer, director, or agent who is also an employee of FLVS. Further, all Proposers must disclose the name of any FLVS employee who owns directly, or indirectly, an interest of five percent (5%) or more in the Proposer or any of its branches/subsidiaries.
- 6.8 Purchasing Agreements with Other Government Agencies. All Bidders submitting a response to this Invitation to Bid agree that such response also constitutes a bid to all political subdivisions under the same conditions, for the same prices and the same effective period as this bid, should the Bidder feel it is in their best interest to do so.

This agreement in no way restricts or interferes with the right of any political subdivision to rebid any or all items.

- 6.9 Proposers, their agents, and/or associates are subject to the provisions of the Florida Sunshine Law, Florida Statute 286.011.
- 6.10 There shall be no discrimination permitted by any party under this engagement as to race, sex, color, creed, national origin, or handicap.
- 6.11 The Procurement Director may terminate this solicitation in whole or in part when it is in the best interest of FLVS. Notification of termination must be in writing and issued by the Procurement Director or designee. This action will be publicly posted.
- 6.12 Should any Proposer fail to enter into a contract with FLVS, on the basis of the submitted response by said Proposer, the Proposer acknowledges that Proposer shall be liable to FLVS for any lost revenue.
- 6.13 Venue for any and all legal action regarding or arising out of the transactions covered herein shall be solely in Florida Court in and for Orange County, State of Florida. The laws of the State of Florida shall govern this transaction.
- 6.14 Attached as Appendix L, is the most current version of FLVS' standard contract. By submitting a response to this RFP, submitters acknowledge and agree that they have reviewed this standard form and have no objection to it. Further, if selected by FLVS, Submitters acknowledge and agree that they will execute this standard form contract, subject to FLVS' right to make revisions and modifications thereto prior to execution, where FLVS has determined, in its sole discretion that such revisions or modifications are in FLVS' best interest.

During contract negotiations, the respondent is expected to make every effort to timely respond to issues to ensure final contract agreement. FLVS will provide certain deadlines to meet during negotiations. Failure to meet the deadlines may be cause for termination of negotiations. In the event that negotiations are terminated, FLVS will follow the procedures outlined in Section 2.3.5.

- 6.15 This contract or agreement is personal to the parties herein and may not be assigned, in whole or in part, by the Proposer without prior written consent of the School. The Proposer herein shall not assign payments under this contract or agreement without the prior written consent of the School.
- 6.16 With the consent and agreement of the Awardee(s), purchases may be made under this response by other school boards and governmental agencies. Services are to be furnished in accordance with the Contract of said product(s) and/or service(s) resulting from this Response. Such purchases shall be governed by the same terms and conditions as stated herein. It is hereby made a part of this RFP that the submission of any response, in response to this advertised request, shall constitute a response made under the same conditions, for the same contract price, and for the same effective period as this response to all public entities if they so request.
- 6.17 All accounting and invoicing correspondence must reference FLVS purchase order number. Invoicing for rental equipment or "tools of trade" will not be allowed. Rental equipment for special circumstances must be pre-approved by FLVS. Invoices and

requests for payment must be accompanied by detailed cost sheets for each project denoting equipment, labor, disposal fees, etc. These items must be received by FLVS consultant/representative at least ten (10) working days before the deadline for submission of Awardee's request for payment dates.

- 6.18 Insurance Requirements: Awardee(s) shall obtain and maintain in full force prior to performance and effect throughout the initial Term and any Renewal Term no less than 5 years past the completion of the project with a reputable insurance carrier qualified to do business in the state or states in which the Premises are located and having a rating of not less than "A" from A.M. Best & Company.
- 6.18.1 All policies of insurance shall be written on a per occurrence basis. All such insurance policies shall, to the extent permitted under applicable law, provide that (a) the policies shall not be cancelled nor shall any material change be made therein without at least ten (10) days prior written notice to Florida Virtual School (FLVS) and (b) FLVS is to be named as an additional insured party with respect to Proposer activities.
- 6.18.2 General Liability Insurance of not less than One Million (\$1,000,000.00) per occurrence and Two Million (\$2,000,000.00) General Aggregate for bodily injury, property damage liability, personal injury, advertising liability, and shall include errors and omissions coverage. The General Liability policy should be on CGL 0001 (12/04) or equivalent form. Insurance shall be primary and non-contributory to any other insurance of the certificate holder and shall name the certificate holder, owners and any other required by written contract or an agreement as additional insured.
- a. Policy should be endorsed with a "per project aggregate". All coverages should include contingent liability and contingent property damage liability. If coverage is written on a Claims made basis the retroactive and continuity dates should be at least the first day services begin with FLVS. Policy should include an endorsement waiving all rights to subrogate against FLVS.
- b. The above policies for General Liability insurance must be so written as to include Contingent Liability and Contingent Property Damage Insurance to protect the contract against claims arising from the operation of subcontractors.
- 6.18.3 Worker's Compensation Insurance: The Awardee(s) shall maintain during the life of this Contract, Worker's Compensation Insurance in accordance with Florida Statute 440. Contractors shall require all subcontractors to maintain such insurance during the life of this Contract Employer's Liability Insurance: The Contractor shall maintain, Employer's Liability Insurance shall be in the amounts not less than Five Hundred Thousand Dollars (\$500,000.00) each accident for bodily injury by accident, Five Hundred Thousand Dollars (\$500,000.00) each employee for bodily injury by disease, and Five Hundred Thousand Dollars (\$500,000.00) policy limit for bodily injury by disease.
- 6.18.4 Automobile Liability Insurance: Automobile Liability Insurance shall be maintained, by Contractor as to ownership, maintenance, and use, including

loading and unloading, of all owned, non-owned, leased or hired vehicles with limits of not less than One Million Dollars (\$1,000,000.00) combined single limit each accident for bodily injury & property damage liability.

- 6.18.5 Professional Liability and Cyber Liability including: Technology Errors and Omissions, Telecommunications Errors and Omission, or Multimedia Professional Liability whichever is applicable not less than One Million Dollars (\$1,000,000.00), and Network Security Liability, Privacy Liability, Crisis Management, Cyber Extortion, and Media Liability not less than One Million Dollars (\$1,000,000.00).
- 6.19 Compliance with the Law: It shall be the responsibility of the Awardee(s) to be knowledgeable of all federal, state, county and local laws, ordinances, rules and regulations that in any manner affect the items covered herein which may apply. Lack of knowledge by the Awardee(s) will in no way be a cause for relief from responsibility. Awardee(s) doing business with the School are prohibited from discriminating against any employee, applicant, or client because of race, creed, color, national origin, sex or age with regard to but not limited to the following: employment practices, rates of pay or other compensation methods, and training selection.
- 6.20 After notification of award, the Awardee(s) shall indemnify and hold harmless FLVS as specified in Florida Statutes Section 725.06. Nothing in the award, resulting agreement, contract, or purchase order shall be deemed to affect the rights, privileges and immunities of FLVS as set forth in Florida Statutes.
- 6.20.1 Successful Proposer shall, in addition to any other obligation to indemnify Florida Virtual School and to the fullest extent permitted by law, protect, defend, indemnify and hold harmless the School, their agents, officers, elected officials and employees from and against all claims, actions, liabilities, losses (including economic losses), costs arising out of any actual or alleged;
- a. Bodily injury, sickness, disease or death, or injury to or destruction of tangible property including the loss of use resulting there from, or any other damage or loss arising out of, or claimed to have resulted in whole or in part from any actual or alleged act or omission of the contractor, subcontractor, anyone directly or indirectly employed by any of them, of anyone for whose acts any of them may be liable in the performance of the work; or
  - b. Violation of law, statute, ordinance, governmental administration order, rule or regulation by contractor in the performance of the work; or Liens, claims or actions made by the contractor or any subcontractor or other party performing the work.
  - c. The indemnification obligations hereunder shall not be limited to any limitation on the amount, type of damages, compensation or benefits payable by or for the contractor of any subcontractor under workers' compensation acts; disability benefit acts, other employee benefit acts or any statutory bar.
  - d. Any costs or expenses, including attorney's fees, incurred by Florida Virtual School to enforce this agreement shall be borne by the Contractor and venue shall be in Orange County.



- 6.21 Patents and Royalties. The Proposer, without exception shall indemnify and hold harmless the School and its employees from liability of any nature or kind including cost and expenses for or on account of any copyrighted, patented, or unpatented invention, process, or article manufactured or used in the performance of the contract, including its use by Florida Virtual School. If the Proposer uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the proposed prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work. In addition, FLVS shall maintain all rights to the written documentation, electronic media and other materials provided by the Contractor in response to this Response.
- 6.22 All information submitted in response to this request shall be submitted in compliance with Florida Statutes Chapter 119.07 Public Records and 812-081 Trade Secrets. All information submitted as "Trade Secret" shall be submitted in a separate envelope and so labeled. If challenged, the Proposer who submits the "Trade Secret" information shall bear all costs associated with defending their position.
- 6.23 Financial Terms and Conditions.
- 6.23.1 Payment: Contractor will provide all Services, as defined in the RFP. All travel and related expenses are included. Payment shall be made in arrears as follows: on a monthly basis in accordance with the contract.
- 6.23.2 Conditions to Payment: Payment to Contractor of the amounts due shall be conditioned strictly upon satisfaction of the conditions for such payment set forth in the Pricing Schedule under the Contract and specifically upon the successful and timely completion of the services. FLVS reserves the right to determine the acceptance process which may include the approval and release of funds.
- 6.23.3 Scope of Work (SOW): In the event that FLVS shall issue a SOW (Scope of Work) for Services, under this Contract, District shall pay to contractor an amount determined by the hourly rates under the Pricing Schedule, not to exceed the maximum cumulative amount for a Scope of Work under this Contract. Invoices for each SOW shall itemize the time and materials expended on the particular SOW.
- 6.23.4 Payment Terms Our Payment Clause
- a. FLVS will remit full payment on all undisputed invoices within forty- five (45) days from receipt by the appropriate person(s) (to be designated at time of contract) of the invoice(s) or receipt of all products or services ordered.
  - b. By submitting a Proposal to the FLVS, the Contractor expressly agrees that if awarded a contract, FLVS may withhold from any payment, monies owed by the Contractor to FLVS for any legal obligation between the Contractor and FLVS.
- 6.23.5 Form of Invoicing: Invoices shall itemize services, dates, and deliverables consistent with the terms of the Contract.
- 6.23.6 INTENTIONALLY OMITTED

6.23.7 State on the Response Price Sheet the Terms and Conditions you will accept for a payment discount. (i.e.: 2% net 45 days, upon receipt of invoice). FLVS shall pay to Provider the fees for services as per State Statute Net 45 days of receipt of approved invoice. The School shall not pay Federal Excise and State taxes on direct purchases of tangible personal property. This exemption does not apply to purchases of tangible personal property made by contractors who use the tangible personal property in the performance of contracts for the improvement of School Board-owned real property as defined in Chapter 192 of the Florida Statutes. The tax exemption number is 85-8013320819C-8.

**6.23.8 Liquidated Damages for Implementation Period**

Liquidated damages shall apply if the Contractor fails to meet the implementation schedule as specified within the Statement of Work. FLVS may, at its discretion, elect to assess liquidated damages in the amount of \$5,000.00 per calendar day until the earlier of the date that:

- a. the Contractor completes and FLVS accepts the delivery of a fully functioning solution satisfying each of the stated requirements, including the successful completion of load testing by the agreed upon date specified within the Statement of Work (SOW).
- b. FLVS secures the deliverable elsewhere.
- c. FLVS needs otherwise cease

**Set-Off Against Sums Owed by the Contractor.** In the event that the Contractor owes FLVS any sum under the terms of the Contract, pursuant to any judgment, or pursuant to any law, FLVS may set off the sum owed against any sum owed by FLVS to the Contractor in FLVS sole discretion.

6.24 FLVS will monitor and enforce compliance by all Awardees and sub-contractors that provide services and/or products to FLVS.

6.24.1 It is the intent of FLVS that all Awardees and sub-contractors supplying services and/or products shall at no time cause unsafe conditions or acts that could have any impact on the safety and health of students, employees, or visitors to FLVS operations. The Awardee(s) may be required to supply a written copy of their Safety Program/Manual for review after contract award. Periodic review of the Awardee's safety manual and operations may be conducted. All Awardees and their employees, including sub-contractors, performing work under the terms of this contract will follow the best safe working practices at all times, as well as comply with all Federal, State, Local, and FLVS safety policies and procedures. This includes the operation of vehicles and equipment on FLVS owned property. Any accidents, injuries, or incidents occurring on FLVS property shall be immediately reported to FLVS Facilities Office.

6.24.2 All awardees shall comply with Chapter 442, Florida Statutes to any item or product delivered or used when providing goods or services under this contract by providing Material Safety Data Sheets when applicable.

6.24.3 The Awardee(s) and their employees, including sub-contractors, performing work under the terms of this contract will follow the best environmental working practices at all times. The Awardee(s) shall not cause any unsafe conditions or acts that could have an impact on the safety and health of students, employees,

or visitors to FLVS operations, as well as comply with all Federal, State, Local, and FLVS environmental policies and procedures. The Awardee(s) may be required to supply a written copy of their Environmental Program/Manual for review after contract award. Periodic review of the Awardee's environmental manual and operations may be conducted. Awardees and sub-contractors will be responsible for removal and cleanup of all contamination (or potential contamination) when it occurs or is identified by FLVS Safety Office. All incidents shall be immediately reported to FLVS Safety Office.

6.25 Federal Provisions [THESE PROVISIONS MAY NOT BE APPLICABLE TO THIS CONTRACT BUT FLVS IS REQUIRED BY THE UNIFORMED GRANT GUIDANCE TO HAVE THIS IN ALL CONTRACTS UTILIZING FEDERAL FUNDS]

- 6.25.1 Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.
- 6.25.2 All Contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be affected and the basis for settlement.
- 6.25.3 Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.
- 6.25.4 Environmental Protection. Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and sub grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the regional office of the Environmental Protection Agency (EPA).
- 6.25.5 Debarment and Suspension Certification. Debarment and Suspension (Executive Orders 12549 and 12689) - A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

6.25.6 Lobbying Certification Contract must adhere to: Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier-to-tier up to the non-Federal award.

## 7. SPECIAL PROVISIONS

- 7.1 Renewals: It is understood and agreed that this contract may be renewed under the same terms, conditions, and specifications governing the original contract, and any request for a change in the contract conditions shall be interpreted as a request not to renew the contract at the end of the current contract period.
- 7.2 FLVS, at its sole discretion, may exercise options to extend the contract for the number of renewals referenced in Section 1.5.2, based upon funding availability and by mutual written consent of both parties. Respondent understands that any rate increases must be requested in writing with supporting documentation, approved by FLVS, and shall not exceed the average CPI for All Urban Consumers U.S. City Average for the renewal periods.
- 7.2.1 INTENTIONALLY OMITTED
- 7.3 Contract Termination: FLVS shall have the right at any and all times to terminate this agreement, with or without cause, upon written notice of such termination provided not less than ninety (90) days prior to the date that such termination is to be effective, or with such lesser notice as FLVS may deem appropriate under the circumstances. Such right to terminate this contract without cause is hereby reserved by and to FLVS. In the event FLVS shall elect to terminate this contract without cause, FLVS shall compensate the Proposer for all work and services provided or supplied prior to the date of termination. In the event that an advance notice of termination is given, the Awardee(s) agree to abide and perform all covenants and provisions of this contract until the date of the termination specified in the written notice of termination. The Awardee(s) shall have no further rights, and FLVS shall have no further obligation to the Awardee(s), subsequent to the date of termination of this contract as specified in the written notice.
- 7.4 Minimum Qualifications/Experience: The Awardee(s) shall maintain a current business license. The Awardee(s) shall keep current all licenses and permits, whether Municipal, County, State, or Federal, required for the performance of its obligations and functions, hereunder, and shall pay promptly when due all such fees. Awardee(s) shall provide documentation of applicable license, certification, and/or commercial experience involving the services described herein. FLVS reserves the right to request documentation at any time during the contract period.
- 7.4.1 Proposer(s) shall include a copy of all-applicable licensing with their response.
- 7.4.2 Inspection of Proposer's Facilities: FLVS reserves the right to inspect the Proposer's facilities and vehicles prior to awarding this contract.
- 7.4.3. It shall be the sole responsibility of the Awardee(s) performing services for this contract to safeguard their own materials, tools, and equipment. FLVS shall not assume any responsibility for vandalism and/or theft of materials, tools, and/or equipment.
- 7.5 Awardee(s) Personnel: Awardee's staff members are to present a professional appearance. Personnel shall be neat, clean, well groomed, properly uniformed, and conduct themselves in a respectable and courteous manner while performing duties and while at any FLVS facility.

7.5.1 Qualifications of new people working under this contract will be submitted to FLVS, in writing, for approval prior to them conducting any service under this contract. Submit a list of all employees who will be working under the current contract, any intention for additional personnel, and back-up personnel for each function.

7.5.2 Effective September 1, 2005, as per Section 1012.465 of the Florida State Statutes all Florida education agencies and Contractual personnel must be in compliance with the Jessica Lunsford Act. Awardees meeting any of the criteria including those permitted access on school grounds when students are present, or those who have direct contact with students, or those who have access to or control of school funds are required to be Level II fingerprinted and screened by our Human Resources Department. This consists of a FDLE/FBI criminal record and fingerprint search. Contractor shall assign no person to perform work hereunder who has any form of criminal record without the prior written authorization of FLVS.

The term "contractor" means any contractor, individual, or entity under contract with a school or with the school board who receives remuneration for services performed for FLVS or a school, but who is not otherwise considered an employee of the FLVS. The term also includes any employee of a contractor who performs services for the school district or school under the contract and any subcontractor and its employees.

The Technical Assistance paper for the Jessica Lunsford Act can be accessed at <http://info.fldoe.org/docushare/dsweb/Get/Document-3151/k12%2005-107a>.

7.6 Public Entity Crimes. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendors list.

7.6.1 The Awardee(s) certifies by submission of this RFP, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

7.7 Communications: Awardee(s) must provide a means to receive direct communications from FLVS. A copy of all written communication concerning contract discrepancies, issues, or concerns from FLVS and the Awardee(s) shall be forwarded to the Procurement/Contract Specialist upon issuance.

7.8 Contract Administration: FLVS will periodically inspect work to assure that the requirements of this contract are being met. Should it be found that the requirements specified herein are not being satisfactorily maintained, the Awardee(s) shall be contacted

and any discrepancies, inconsistencies, or items not meeting the specifications contained herein, are to be corrected immediately at no additional cost to FLVS. A second discrepancy notice shall serve as notification that any future discrepancies, inconsistencies, or items not meeting specifications contained herein, will result in termination of the Awardee's right to proceed further with this work. In such event, the Awardee(s) will be paid only for materials used. The Awardee(s) and their sureties may be liable to FLVS for any additional cost incurred by FLVS to complete the job. At this point, the Awardee(s) shall be considered in default and the contract subject to termination. Performance ratings may be considered during award of future contracts by FLVS.

- 7.8.1 Failure of the Awardee(s) to comply with any of the provisions of this contract shall be considered a material breach of contract and shall be cause for immediate termination of the contract, at the discretion of FLVS.
- 7.8.2 FLVS reserves the right to terminate this contract, in whole or in part, should the need for the services cease to exist.
- 7.8.3 Awardee(s) shall be subject to periodic performance evaluations by FLVS personnel. Continued unsatisfactory ratings shall be cause to find the Awardee(s) in default of the contract.
- 7.8.4 Upon cancellation of any ensuing agreement, FLVS reserves the right to award the contract to the responsible Proposer(s) offering the next highest rated response to FLVS for the unexpired term of the canceled contract, or for a full year period, whichever is deemed to be in FLVS's best interest.
- 7.9 FLVS Facility Security: All personnel must coordinate with the facility's front office or security personnel. Awardee's employees must be properly identified and must sign in and sign out when working or making deliveries during operational hours. All personnel must remain in the assigned work area.
- 7.10 Marketing Agreement/Use of Product: Trademark License: Neither party shall without the other party's written consent and approval: (i) permit usage of corporate logos, names and trademarks in marketing materials, provided such usage shall be subject to a limited license and shall be in conformance with such party's logo usage and trademark guidelines; (ii) at its own expense and in its sole discretion, furnish to the other party reasonable quantities of marketing collateral and other sales promotion materials upon request; (iii) list the other party as an Partner on their website; and (iv) issue with the other party a joint press release announcing formation of the referral relationship between the parties, provided, however, that neither party shall issue any press release regarding the other party without the other party's prior written consent.
- 7.11 Identical Qualifying Bids: In the event of identical qualifying bids, FLVS will execute the tie breaking procedure contained in its policies and procedures manual, section F11 purchasing.2A General Provisions Related to Competitive Solicitations.
- 7.12 Software Related Purchases: Proposers acknowledges that FLVS has a duty to maintain the privacy of student records, including without limitation education records as defined by the Family Educational Rights and Privacy Act (20 USC § 1232g; 34 CFR Part 99) ("FERPA"), and further acknowledges that as a contractor to whom FLVS has outsourced certain institutional services or functions: A. Confidential information about FLVS' students is contained in records provided to and maintained by Proposer, and Proposer will protect

the privacy of all student education records to the fullest extent required of FLVS under FERPA; B. Proposer is performing an institutional service or function that has been outsourced by FLVS and for which FLVS would otherwise use its employees; C. Proposer is under the direct control of FLVS with respect to the use and maintenance of education records, as defined by FERPA; D. Proposer is subject to all FERPA requirements governing the use and re-disclosure of personally identifiable information from education records, including without limitation the requirements of 34 CFR § 99.33(a); E. Even in circumstances that might justify an exception under FERPA, Proposer may not disclose or re-disclose personally identifiable information unless FLVS has first authorized in writing such disclosure or re-disclosure; and F. Proposer will not use any personally identifiable information acquired from FLVS for any purpose other than performing the services or function that are the subject of this agreement.



## 8. SCOPE OF WORK

8.1 Scope of Services: Florida Virtual School (FLVS) is soliciting proposals for a service provider to support our Call Center and IT Help Desk Operations. We are seeking a single service provider with cost effective solutions and the ability to satisfy all FLVS support requirements specified herein. All services shall be performed remotely at Respondent facility. New services must be in place and fully operational no later than July 1, 2020. Support Services include both Inbound and Outbound Call Center and IT Technical Support Call Center Services. The proposed solution shall include telephone support via a single point of contact (FLVS toll-free) number for inbound and outbound contacts providing Level 1 support with ability for escalation to Level 2 support as required.

### 8.1.1 Procedures and Methodology

The Call Center shall provide Level 1 Support by answering calls, chats and self-service tickets, logging and tracking incidents, and escalating calls/contacts as necessary to Level 2 (FLVS Advanced Technical Support). Support Calls/Contacts regarding applications and services will be resolved within the time frame negotiated with this proposal. Respondent agents will log, diagnose, resolve, and escalate when required. In cases where the call is not first contact resolvable, the incident is routed to Level 2 support for resolution. Level 1 agents will be responsible for supporting all applications, software and processes utilized by FLVS students, clients, and staff. Support includes all upgrades, enhancements, new versions and replacement applications for each of the standard applications.

The Help Desk will address incidents and respond to the users in accordance with the agreed-upon procedures and Service Levels. Respondent is responsible for maintaining procedures necessary to provide services as well as ensuring assignment of qualified support professionals (Agents) supporting the user base meeting agreed upon service levels. Respondent shall utilize FLVS Incident Management System performing the process developed adhering with priority definitions (Section 8.5 Levels of Criticality) to set the priority for any incident and propose resolution times for those priority levels.

### 8.1.2 Background Information

The user base will initially consist of approximately 1800-2500 employees and approximately 210,000 active students. The respondent shall demonstrate their ability to meet the anticipated growth of FLVS over the next five years.

FLVS employees utilize Microsoft Windows and Apple OS compatible computers to access FLVS systems. Services to employees require full technical support. FLVS reserves the right to change technology standards at its sole discretion. Basic support shall include but is not limited to mobile devices (IOS and Android), email configuration, video settings, and application support.

FLVS students utilize their personal hardware to access FLVS courses. **Support agents will NOT remote access into student devices under any circumstances (unless an FLVS asset tag applies such as a loaner laptop).** The scope of work specific to students and or student parents shall be limited to FLVS systems required to complete course work be demonstrating the ability to successfully access and utilize the following:

- FLVS Student Information System (SIS)
- FLVS Learning Management System (LMS)
- Any software provided by FLVS
- Student owned basic productivity applications used toward the completion of a course
- FLVS Incident Management System (Service Now)

Inbound Operations: FLVS receives between 20,000-50,000 inbound calls per month with an average handle time of six minutes and thirty seconds (6:30). Peak times are January, May, June and August, Low volume times are December, March and April. Please see monthly inbound breakdown on page 36. If FLVS utilizes an established toll-free number that routes calls to an internal IVR. The caller is prompted to select from recorded options that direct the caller to the appropriate support area. Peak times are January, May, June, and August. Low volume times are December, March, and April.

**Outbound Operations:** Outbound operations reach out to students and parents on an as needed basis to respond and resolve student concerns. The Outbound volume is estimated at 4,000 calls per month on average. Outbound call volumes include returning calls when messages are left with the automated system.

Outbound services may also include marketing or survey efforts directed by FLVS. Specific criteria and targets would be provided. Respondent would make appropriate inquiries and report results.

**Live Chat:** FLVS offers a cloud-based live chat to our students/parents via our website. Live Chat represents approximately 22% of our phone contacts.

**Ticket Submission:** FLVS logs tickets for every customer interaction into a separate web-based system with restricted access. Tickets are routed to FLVS personnel or resolved at the point of contact on a first call resolution system. Agents are assigned individual credentials for system access.

### **8.1.3 Service Levels**

Service Levels shall be measured as an average on a monthly basis. FLVS requires the minimum service metrics listed in Figure 8.1. Respondent is encouraged to propose additional appropriate Service Level Metrics and must propose the Level at which these metrics will be delivered. Respondent should format this information to match Figure 8.1 below.

**Service Level Metrics & Format (Figure 8.1)**

| Service Level Metric |  | Description   | Goal  |
|----------------------|--|---|---|
| 1                    | Average speed of Answer Phone/Chat Contacts              | Amount of time between when a call is routed by the Automated Call Distribution (ACD) System to a support professional and when a support center professional answers the call. This metric includes the average speed of answer for automated message callbacks (with ability to report ASA separately for each category). | 80% of Calls answered in 2 minutes or less (non-peak times).<br>80% of Calls answered in 20 minutes or less (peak times). |
| 1a                   | Average Speed of Answer: User Entered Trouble Incidents  | Amount of time that a support center professional will respond to an incident being raised via submission in the online support portal.   | User-entered incidents answered in 8 minutes  |
| 2                    | Abandon Rate   | The percentage of total calls received that self-release from ringing or queue before reaching a support professional.  | 6% or less  |
| 3                    | First Contact Resolution: Phone/Chat Contacts            | Percent of calls resolved by the [contractor] Help Desk, thereby eliminating the need for escalation to Tier 2." The monthly rate shall exceed 75%  | 75% or greater per month  |
| 4                    | First-Contact Resolution: User Entered Trouble Incidents | Percent of calls resolved by the [contractor] Help Desk, thereby eliminating the need for escalation to Tier 2."  | 75% or greater per month  |
| 5                    | Re-work/Reopened Incidents                               | Incidents that are reopened by the user due to the issue not being resolved   | 10% or less   |
| 6                    | Customer Satisfaction                                    | Based on survey results "On a scale of 1-5"   | Minimum acceptable value would be 4.0 Rating (80% of the time).   |

**FLVS Performance Standards:** FLVS System uptime of telephone, web and email system availability for the initiation of Help Desk tickets by client constituents has a benchmark of “99.99%” uptime on monthly basis, excluding scheduled system maintenance and ‘Acts of God.’”

FLVS Online Help Desk Tracking System (ServiceNow Incident Management System) has a benchmark of “99.99% uptime on a monthly basis, excluding scheduled system maintenance and ‘Acts of God.’”

**Key Performance Metrics**

Average Handle Time (AHT): <6 minutes 30 seconds

Service Level (SL): >80%

Chat Response Time: <1:00

SMS/Text Response Time: <1:00

Quality Assurance: >90% Across all channels (Chat, Text, Tickets, Phone)

Attrition: <10%

**8.1.4 Estimated Usage Volumes**

The following demonstrates the average call/chat volumes over the past fiscal year. These estimates reflect quarterly totals. FLVS typically experiences increased call volumes prior to the start of the new school year (July and August) with student/parent Tier 1 calls. Mondays and Tuesdays have higher volumes than later in the week with the lowest volumes during weekends. FLVS experiences reduced call volumes during holiday breaks (FLVS holiday schedule for school year 2019/2020 is provided in Section 8.4 #21.

**Level 1 Support:** includes all contacts that are both technical and non-technical in nature. These may include but are not limited to parent and student inquiries, primarily performs password resets, and student registration and all technical support. Contacts regarding technical issues require, agents with IT skillsets that can address technology related issues as well as additional student support such as exam resets during holidays or off hours including hardware troubleshooting, mobile application support and other technology related issues.

**Level 1 Call/Chat Volumes**

**Call Center Volumes for 2018-2019 Fiscal Year**

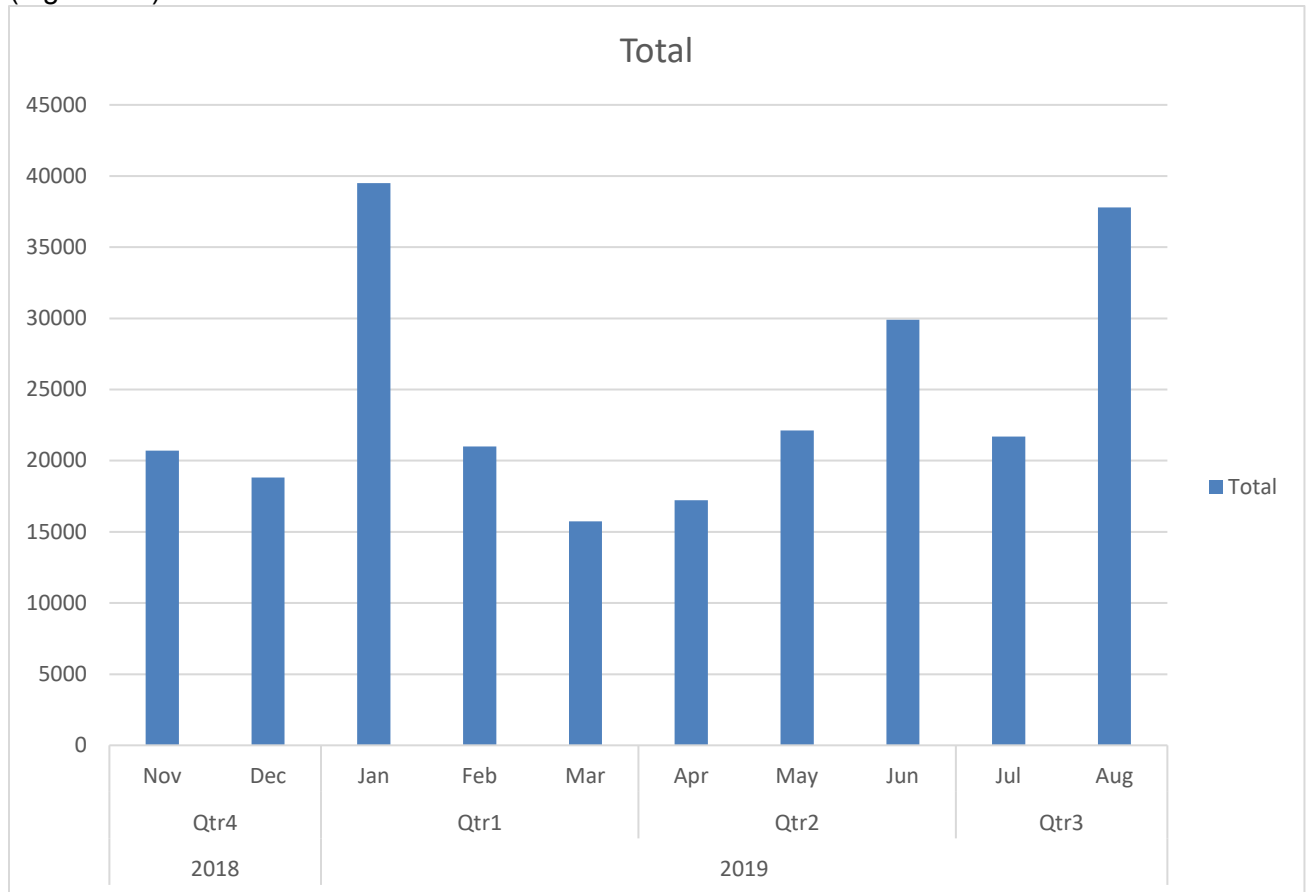
| <b>2018-2019</b>          | <b>Q1 Totals</b> | <b>Q2 Totals</b> | <b>Q3 Totals</b> | <b>Q4 Totals</b> | <b>Annual Total</b> |
|---------------------------|------------------|------------------|------------------|------------------|---------------------|
| Number of Telephone Calls | 187,729          | 103,339          | 122,938          | 116,080          | 530,086             |

| <b>2018-2019</b>        | <b>Q1 Totals</b> | <b>Q2 Totals</b> | <b>Q3 Totals</b> | <b>Q4 Totals</b> | <b>Annual Total</b> |
|-------------------------|------------------|------------------|------------------|------------------|---------------------|
| Number of Chat Sessions | 18,006           | 17,375           | 22,993           | 24,998           | 83,372              |

#### All Other Sources of Contact

| Time Period    | Email        | Outbound Contacts |
|----------------|--------------|-------------------|
| July 2018      | 234          | 1,538             |
| August 2018    | 354          | 1,705             |
| September 2018 | 185          | 1,368             |
| October 2018   | 160          | 650               |
| November 2018  | 136          | 567               |
| December 2018  | 137          | 660               |
| January 2019   | 252          | 2,026             |
| February 2019  | 172          | 713               |
| March 2019     | 152          | 259               |
| April 2019     | 177          | 166               |
| May 2019       | 177          | 518               |
| June 2019      | 235          | 1,616             |
| <b>Total</b>   | <b>2,371</b> | <b>11,786</b>     |

Inbound Call Patterns Only (does not include Chats, Self-help Tickets or Outbound call volumes)  
(Figure 8.2)



FLVS has additional technical chat services effective July 1, 2019. During peak business periods this service may experience as many as 400 chat requests per day. 1249 chats were handled by Level 1 Tech Support for the month of July. This number should be used to estimate annual usage.

Level 2 Contact: Advanced level technical support provided by FLVS systems administrators and engineers.

#### **8.1.5 General Assumptions**

- Call flows and escalations will be defined and agreed upon during the Startup Period
- All user calls for IT support will route directly to the technical Help Desk
- FLVS assigns dedicated resources as points of contact or for paths of escalation upon award
- Service parameters that will be used to develop the Service Levels and pricing will be based upon information provided in this document and the response to it.
- Standard SLAs for ticket response time for agents is 24-48 hours. We also adhere to that internally on Customer Care with a few exceptions, but we make attempts 24-48 initially and in-between attempts.
- Reporting and metrics will be derived from FLVS Incident Management System as well as direct access to Respondent's ACD performance results is required.
- FLVS will provide any appropriate information and access for Respondent to establish and maintain a VPN connection when needed.
- Respondent will **not** remotely control any student device unless the laptop is FLVS property with an FLVS asset tag (i.e. loaner laptop assigned to student).
- When a reference is made to a Student in this document, the assumption is that support is provided for Parents at the same level when concerning access to courses, FLVS systems or student progress.
- FLVS will provide the awarded vendor with the requirements for voice and data communications for FLVS phone system integration
- FLVS and Respondent will agree upon a detailed, event driven, notification and escalation matrix (SOP)
- Respondent shall provide high availability overflow support during peak demand periods, such as start of school year, registration, grade entries, major system issues and new system/new releases as scheduled.
- Respondent must log all interaction in FLVS used Customer Relation Management (CRM) system. FLVS is responsible for providing agent access.
- Timely and reasonable response and resolution to request is expected.
- Agents shall provide professional assistance with demonstrated empathy for respective customer issues. Agents shall always provide clear, understandable responses in a courteous and professional manner.
- FLVS will work with awarded contractor to establish agreed upon priority levels and call categories
- FLVS will provide train-the-trainer product training to Help Desk Professionals on all proprietary and customized applications
- FLVS shall provide access to knowledgebase articles for all customized and proprietary applications for Level 1 Help Desk support requirements

#### **8.1.6 FLVS shall provide:**

FLVS provide support to the awarded Respondent for the following:

- Level 2 (administrator) and Level 3 (engineering) support for the FLVS supported desktop devices, network devices and servers
- Provide Level 2 and Level 3 support for custom applications
- Provide call priority levels and call categories
- Provide train the trainer product training for Help desk Support professionals on all proprietary and customized FLVS applications (including materials, scripts, and QA forms)
- Authorize and provide initial FLVS network accounts providing required access
- Provide system access and authorization into FLVS systems for daily support requirements
- Provide points of contact for resolution of items within FLVS responsibility according to the negotiated terms of the proposal
- Provide FLVS point of contact for day-to-day operative support
- Provide escalation path / details pertaining to Wellness Incidents (IMMEDIATE response tickets)

- FLVS shall deliver Train-the-Trainer instruction to the designated individual(s) appointed by the awarded contractor. The designated individual(s) shall become the “Trainer.” The **Trainer**, subsequently serves as the subject-matter expert responsible for delivering training to all other Service Provider assigned Agents
- FERPA Guidelines

#### **8.1.7 FLVS System Access including (but not limited to):**

- Service Now Ticketing System
- Virtual School Administrator
- Zendesk (or alternative chat function)
- Salesforce
- Live Chat
- Active Directory
- Learning Management System
- Remote Desktop Connection
- SMS/Text
- Focus SIS (Student Information System used for FLVS Full Time only)
- Admission and Registration (if still active)

#### **8.1.8 Data Ownership:**

- All data collected shall remain the sole property of FLVS. Upon termination of contract, all data shall be returned to FLVS within five business days in the format specified.
- Respondent may utilize ‘blind data’ for the purpose of assessing performance metrics
- Student Data Registration Information collected shall be in the FLVS Student Information System
- Data collected from outbound Marketing campaigns and saved on Salesforce shall remain the sole property of FLVS

### **8.2 Respondent Questionnaire, Functional Technical Requirements**

The purpose of the questionnaire and requirements table(s) is to ensure that the proposal matches stated requirements specified herein.

**8.2.A. Respondent Questionnaire:** All respondents **must** complete and submit, as part of their proposal, the Functional Requirements table shown below. If customization is required provide explain in your response. Response items and customizations shall be included in the price. All responses shall be based upon the current version of product offered (not future developments).

| <b>8.2.A. RESPONDENT QUESTIONNAIRE</b> |   |
|--|---|
| <b>Requirement Number</b>              | <b>Description</b>  |
| <b>1</b>                               | Describe your process to support telephone outages, network outages, or shortage of staff. Include any redundancy plans, include communication plans and call-back times when contingency plan is active).  |
|  | Response:   |
| <b>2</b>                               | In the event of an emergency such as a tropical storm or hurricane how do you continue to provide support if evacuated or experience a power outage?  |
|  | Response:   |
| <b>3</b>                               | Describe the training and knowledge transfer process for internal staff that ensures adequate support for FLVS calls. Include timelines, overall approach and any dependencies or assumptions including the Train-the-Trainer approach as required. |
|  | Response:   |
| <b>4</b>                               | Do you have a disaster recovery plan to address natural disasters? Describe your contingency plans.   |
|  | Response:   |
| <b>5</b>                               | Describe how your organization provides Level 1 Support as defined herein.  |
|  | Response:   |

| 6  | Provide plan detailing the transition and implementation plan including timelines, resources and other information to clearly define your approach to delivering specified services.  |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|--|---|--------------|-----------------------------------|-------------------|-----|------------------------|--|----------------------|--|--------------------|--|------------|
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 7  | Describe in detail the Service Level Agreements including the details required upon customer reporting an incident, classifications and paths of escalation. Include minimum guaranteed levels of performance and subsequent penalties, service periods (i.e. monthly/quarterly), and credit process including timeframe.   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 8  | Respondent shall list downtime credits and remedies as follows:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | <table border="1"> <thead> <tr> <th>Availability</th><th>Response: FLVS Credit % or Policy</th></tr> </thead> <tbody> <tr> <td><math>99.9\% \leq x^1</math></td><td>N/A</td></tr> <tr> <td><math>99.5 \leq x &lt; 99.9\%</math></td><td></td></tr> <tr> <td><math>99 \leq x &lt; 99.5\%</math></td><td></td></tr> <tr> <td><math>98 \leq x &lt; 99\%</math></td><td></td></tr> <tr> <td><math>x &lt; 98\%</math></td><td></td></tr> </tbody> </table> | Availability | Response: FLVS Credit % or Policy | $99.9\% \leq x^1$ | N/A | $99.5 \leq x < 99.9\%$ |  | $99 \leq x < 99.5\%$ |  | $98 \leq x < 99\%$ |  | $x < 98\%$ |
| Availability                                     | Response: FLVS Credit % or Policy   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| $99.9\% \leq x^1$                                | N/A   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| $99.5 \leq x < 99.9\%$                           |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| $99 \leq x < 99.5\%$                             |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| $98 \leq x < 99\%$                               |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| $x < 98\%$                                       |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| Response: Respondent shall populate table above. |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  |   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 9  | Describe your specific approach to supporting); student callers with ADA requirements (refer to Section 3.1.6).   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 10   | Describe in detail your methodology for delivering closed captioned content for participants with auditory impairments.   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 11   | Describe in detail your methodology for Help ticket processing including escalation paths and levels of criticality.  |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 12   | Describe in detail your plan to implement the Scope of Services (including training) indicating key dates and milestone durations.  |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 13   | Attach a list of proposed reports. Include samples and/or descriptions.   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 14   | FLVS requires that the awarded contractor can support callers Fluent in English as well as Spanish. List any additional language that can be supported fluently (i.e. French/Creole/other).   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 15   | Describe how you will manage existing unresolved tickets if you are the selected contractor.  |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 16   | Describe your staffing plan including the number of resources that would be assigned to support the needs of FLVS based upon the volumes provided.  |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 17   | Do you have facilities located within Orange County or within the state of Florida?   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
|  | Response:   |              |                                   |                   |     |                        |  |                      |  |                    |  |            |
| 18   | FLVS is interested in learning about the available reporting capabilities. Does your offering include summary and/or real-time reporting? Include in your response  |              |                                   |                   |     |                        |  |                      |  |                    |  |            |

|    |  |
|----|--|
|    | reporting periods that are available such as Year to Date, Quarterly, Monthly, etc. Provide specific options available.<br>Response:   |
| 19 | FLVS required respondents log tickets into the FLVS incident management system.<br>Response:   |
| 20 | Does your organization provide real-time access to the reporting dashboard?<br>Response:   |
| 21 | FLVS is seeking a respondent solution that provides automated call-back functionality that saves the callers place in call waiting queue. It is expected that calls in queue should not exceed 2 minutes call-back time during non-peak seasons and 20 minutes during peak seasons. Describe any deviations or alternatives that may apply.<br>Response: |

**8.2.B Minimum Functional & Technical Requirements** - All Contractors **must** complete and submit, as part of their proposal, the Functionality and Requirements table(s) shown below. **Indicate if the requirement will be met. Answering “Yes” affirms meeting or exceeding each requirement which is included in the proposed pricing provided in Section 9.**

#### 8.2.B. MINIMUM REQUIREMENTS

| Requirement Number       | Description of Requirement   | Requirement Shall be Met Yes or No |
|--------------------------|--|------------------------------------|
| B.1 Service Levels       |  |                                    |
| 1                        | The ASA (Average Speed of Answer) is two minutes or less   |                                    |
| 2                        | The FCR (First Call Resolution) per month exceeds 75% of calls received.   |                                    |
| 3                        | The Call Abandon Rate is less than 6% of calls received per month.   |                                    |
| 4                        | Contractor notifies FLVS 10 days in advance of any planned service outages.  |                                    |
| 5                        | Respondent's response times adhere with FLVS standards referenced herein   |                                    |
| B.2 General Requirements |  |                                    |
| 1                        | Support is provided to FLVS callers 365 days per year (Monday through Friday between the hours of 7:00 AM EST and 9:00 PM EST and between the hours of 9:00 AM EST and 5:00 PM EST Saturday-Sunday)            |                                    |
| 2                        | Agent resources are available for exam reset support during holidays or special events.  |                                    |
| 3                        | Upon contract execution, respondent provides a dedicated account representative to serve as the single point of contact.   |                                    |
| 4                        | Respondent has a minimum of five years of experience of similar size and scope preferably in the K-12 educational sector.  |                                    |
| 5                        | Awarded vendor shall adhere with required JLA compliance (see definitions Section 8.4 for additional information) in accordance with Florida Statutes, at their own expense prior to commencement of services. |                                    |
| 6                        | Respondent utilizes FLVS Incident Management System and Knowledge Base to support the Help Desk.   |                                    |
| 7                        | Respondent utilizes FLVS provided CRM (Customer Relations Management) system logging all customer interactions and escalations   |                                    |



|                                |   |  |
|--------------------------------|---|--|
| 8                              | Respondent provides evidence of all efforts to use existing staff to handle increased call activities in order to maximize performance service levels.  |  |
| 9                              | Respondent grants access to ACD system to FLVS upon contract execution  |  |
| 10                             | The actual call volume is determined by the monthly service reports generated from the incident management system and the respondents ACD system.   |  |
| 11                             | Respondent participates in 2 weekly meetings with assigned FLVS representative(s). Subject matter includes review of concerns, open issues and Quality Assurance.   |  |
| 12                             | Respondent agrees to monthly meetings with FLVS to review service level performance and ensure consistency with specified requirements and provide reports of any required remediation.   |  |
| 13                             | Respondent agrees to attend quarterly meetings with FLVS to review service performance over prior quarter, review trends and reporting measures, review action items and resolutions, and to identify opportunities and areas for improvement.                                |  |
| <b>B.3 Agent Requirements</b>  |   |  |
| 1                              | All agents must be physically based in the United States.   |  |
| 2                              | FLVS shall provide Annual Security Awareness Training. Respondent agrees that all agents complete FLVS provided Security Awareness Training on an annual basis prior to accessing FLVS systems or calls.  |  |
| 3                              | Respondent employs resources with ability to provide multi-language support with fluency in English and Spanish   |  |
| 4                              | All respondent resources are fluent in English  |  |
| 5                              | Agents have knowledge of all FLVS supported technology as listed on the FLVS system requirements web page ( <a href="https://flvs.net/student-resources/system-requirements?source=quickLinks">https://flvs.net/student-resources/system-requirements?source=quickLinks</a> ) |  |
| 6                              | All Technical Support Call Center Representatives supporting FLVS shall complete a skills assessment or training test with a score of 90% or higher prior to taking calls.  |  |
| 7                              | All agents are required to pass a Level II background check for JLA compliance requirements at respondent's expense.  |  |
| 8                              | All agents are required to adhere with FERPA guidelines.  |  |
| <b>B.4 Incident Management</b> |   |  |
| 1                              | Agent provides notification to FLVS identifying recurring issues that impact student ability to complete coursework.  |  |
| 2                              | Agent notifies FLVS when request is related to a current enrollment.  |  |
| 3                              | Agents receive help or trouble calls and log incidents into ticketing system by populating all required fields  |  |
| 4                              | Agent enters and records callers' information into the Service Management System  |  |
| 5                              | Agent is responsible for Incident classification, escalation, tracking and status reporting   |  |
| 6                              | Agent is responsible for entering a detailed incident for every customer interaction  |  |
| 7                              | Agent is responsible for Level 1 hardware support for FLVS employees  |  |
| 8                              | Agent provides customer Level 1 support for FLVS custom applications  |  |
| 9                              | Agent provides Level 1 support for third party applications, instructional software, plugins required to use our courses  |  |

|                              |  |  |
|------------------------------|--|--|
| 10                           | Agent provides support for password creation, resets and administering FLVS employee access rights   |  |
| 11                           | Agent provides support for mobile device connection to exchange  |  |
| 12                           | Agent provides support for mobile device video settings  |  |
| 13                           | Agent is responsible for Level 1 network connectivity support to FLVS employees and students including wireless using 'best effort' for up to ten attempts at resolution before escalation to service provider or hardware manufacturer.   |  |
| 14                           | Agent assists callers with all concerns regarding student registration, including but not limited to supporting callers with account creation, course requests, updating existing (student) account information, placement and/or withdrawal assistance.                               |  |
| 15                           | Agent provides exam resets when student loses connectivity or times out during exam or attempts to navigate to another webpage while testing. Exam resets shall be conducted within prescribed timeframes within the FLVS 12-month calendar. FLVS shall provide explicit instructions. |  |
| 16                           | For all contact interactions, agent accurately logs incidents in Incident Management System, categorizes, assigns level of criticality, and monitors progress until resolution   |  |
| 17                           | Respondent accepts, manages, monitors, tracks and resolves incidents   |  |
| 18                           | Respondent provides user with status updates and follow-up on open incidents   |  |
| 19                           | Respondent is responsible for enacting any updates or modifications on incidents.  |  |
| 20                           | Agent manages and provides Level 1 support at the initial point of contact for all FLVS users  |  |
| 21                           | Agent routs calls to appropriate Level 2 and/or Level 3 resources as needed  |  |
| 22                           | Agents utilize remote control software to perform incident definition and to remotely correct device issues for FLVS employees when needed   |  |
| 23                           | Establish and follow agreed upon escalation procedures for logged incidents  |  |
| 24                           | The contractor will need to staff employees to monitor, direct, and resolve the tickets created by the service center or sent to the service center for resolution by FLVS staff.  |  |
| 25                           | Agents shall log tickets for every contact into FLVS system.   |  |
| <b>B.5 Quality Assurance</b> |  |  |
| 1                            | Respondent agrees to using the QA form as provided by FLVS, each agent receives a minimum of 1 score per week for Phone/Chat/SMS interactions.   |  |
| 2                            | Every agent receives 1 to 2 audits of their individual ticket submissions per month.   |  |
| 3                            | The Contractor provides dedicated QA representatives to review weekly scores and monthly audit results.  |  |
| 4                            | The Contractor conducts a weekly meeting with FLVS management staff to review concerns, open issues, and/or outstanding items.   |  |
| 5                            | The Contractor conducts a weekly meeting with FLVS management dedicated to the purpose maintaining of Quality Assurance and SLA standards.   |  |
| 6                            | Respondent agrees to all calls recorded for quality assurance purposes and granting FLVS full access to 100% of the files in real time.  |  |

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|---|--|--|
| 7   | Respondent performs a Quality Assurance and Quality control process of Help Desk Support Professional Performance  |  |
| 8   | Respondent Customer Satisfaction per month averages 4.0 points out of 4.0 points for 80% of all surveys completed per month.   |  |
| 9   | All closed tickets shall generate an event survey to be completed by the caller  |  |
| 10  | The Quality Assurance Survey is presented to the caller upon completion of the call/contact.   |  |
| 11  | Completed Quality Assurance Surveys are summarized with results reported to FLVS on a weekly basis.  |  |
| 12  | All Quality Assurance Surveys are available to FLVS upon request on demand.  |  |
| <b>B.6 Reporting</b>  |  |  |
| 1   | Services include reporting tools for activity tracking (including but not limited to number of calls received, number of calls answered, number of abandoned calls, average wait times, average call durations and types of issues). |  |
| 2   | Reporting services include both standardized and ad-hoc reports at no additional cost.   |  |
| 3   | Customer Service Satisfaction Survey reporting is included   |  |
| 4   | Respondent provides performance measurement reports derived by the Incident Management System and ACD system   |  |
| 5   | Respondent provides reports for incidents assigned to direct support staff as well as indirect support staff.  |  |
| 6   | Service Levels and Performance Reporting provided  |  |
| 7   | Help Desk Reporting metrics are provided monthly and aggregated month to date  |  |
| 8   | All reporting requirements are provided from the Incident Management System (the system of record)   |  |
| 9   | Respondent provides operational performance metrics reporting from ACD by granting access to ACD or other system to generate ad-hoc reports  |  |
| 10  | Respondent provides reporting real-time reporting capability of active agents logged in vs active on the FLVS account  |  |
| 11  | Respondent provides access to all recordings   |  |
| 12  | Respondent creates and delivers custom reports extracted from the Incident Management System as well as other systems available  |  |
| 13  | Respondent shall create and deliver all reports as described herein based upon written and agreed upon specifications no later than the 10 <sup>th</sup> calendar day of each month of the contract.                                 |  |
| <b>B.7 Training &amp; Knowledge Sharing &amp; Self-Help Functionality</b> |  |  |
| 1   | Respondent agrees to utilize the FLVS "Train the trainer" approach to spread knowledge more efficiently between the support teams  |  |
| 2   | Respondent agrees to create and maintain knowledgebase articles visible to the customers at no extra cost  |  |
| 3   | Respondent agrees use the information given by FLVS to instruct their staff at no additional cost  |  |
| 4   | Respondent agrees to deliver call quality assurance monitoring and customer support training to agents as needed with a minimum of once per week   |  |
| 5   | Transfers between agents must be handled via "warm transfer"   |  |

|  |   |  |
|--|---|--|
| 6  | Respondent agrees to create and maintain knowledgebase articles for use by the support teams at no additional cost. All articles must be approved by FLVS before publishing.  |  |
| 7  | Respondent provides and maintains articles and documentation for the FLVS Knowledge Base including responsibility for day-to-day management, data entry and routine maintenance.  |  |
| 8  | Respondent provides Standard Operating Procedures (SOP) for use during Tier 1 Help Desk Support Professionals   |  |
| 9  | Contractor must support technological advances with 30 days prior notification from FLVS (supporting FLVS's practice to provide materials and one-on-one training).   |  |
| 10   | Respondent provides a Customer facing Technical Knowledgebase   |  |
| <b>B.8 Technology and Equipment Requirements</b> |   |  |
| 1  | All contractor equipment must meet minimum system requirements provided by FLVS <a href="https://www.flvs.net/student-resources/system-requirements">https://www.flvs.net/student-resources/system-requirements</a>   |  |
| 2  | The contractor equips their technical support agents with remote desktop access tool (i.e. Bomgar, MSP Anywhere, LogMeIn)   |  |
| 3  | Respondent Services include ability to access via a toll-free number or extension when caller is utilizing FLVS telephone system  |  |
| 4  | Services include ACD Greeting Management  |  |
| 5  | Respondent provides ACD and call recording system   |  |
| 6  | Respondent will provide ACD and IVR capabilities with monitoring, call recording and on-demand reporting  |  |
| 7  | Respondent provides ACD custom greetings including system outage notification messages  |  |
| 8  | Respondent Provides all licensed software required to provide services specified within the proposal  |  |
| 9  | All Hold Messages are subject to FLVS approval prior to use   |  |
| 10   | Ability to customize hold messages as per FLVS direction on demand  |  |
| 11   | Respondent has appropriate access, authority, and network bandwidth in order to remotely control FLVS Employee PCs.   |  |
| 12   | Inbound caller is prompted to select English or Spanish for call direction  |  |
| 13   | Option for "auto-call back" without losing place in hold queue is available or voicemail option (with returned calls)   |  |
| 14   | Services include access to call queue and agent's data (agents online, calls waiting in queue, abandon rate, etc.)  |  |
| 15   | Respondent provides dedicated telephone lines for FLVS callers supporting peak call volumes.  |  |
| 16   | FLVS shall provide a toll-free number and voice access to the Contractor's data center. Once the inbound call is within the Contractor's data center, the Contractor shall, at its expense, route inbound calls to the Contractor's Customer Service Representatives. |  |
| 17   | System supports Incident receipt and recording  |  |
| 18   | Services include remote control of desktop software for troubleshooting and incident resolution (FLVS employees only)   |  |
| 19   | Respondent maintains all systems required to support proposal   |  |
| 20   | Responsible for providing and maintaining all tools and technology required by support agents   |  |
| 21   | System generates electronic notification of status updates of the incident to the user. Status updates may include but are not limited to technician  |  |

|  |   |  |
|--|---|--|
|  | assignment, escalation, priority change, problem analysis update, technician request or resolution  |  |
| <b>B.9 In-Bound/Outbound/Live Chat</b> |   |  |
| 1                                      | Ability to support between 20,000-50,000 inbound calls per month.   |  |
| 2                                      | Maintains an average handle time not to exceed 7 minutes  |  |
| 3                                      | IVR and phone routing system including "Total Call Recording" and "Workforce Management" capable of supporting FLVS needs as specified            |  |
| 4                                      | Skill groups for support agents include FLVS Full Time, FLVS Flex, Elementary and additional technical support provided to FLVS District Partners |  |
| 5                                      | Respondent shall provide all Outbound Call Services.  |  |
| 6                                      | Respondent is staffed to support in excess of 4,000 outbound calls per month in response to tickets submitted.                                    |  |
| 7                                      | Contractor provides support via Live Chat inquiries from students/parents between 8:00 AM EST and 6:00 PM EST Monday through Friday.              |  |
| 8                                      | The Live Chat system will allow multiple chats at a time per agent, but we cap at 3 active sessions per agent at a time                           |  |

### **8.3 Project implementation, Professional Services and Training Requirements**

The high-level implementation timeline is outlined below.

FLVS requires a contractor that can assist with the project planning and execution.

#### **8.3.1 Project Implementation Timeline**

The final implementation schedule shall be determined within 10 days of the contract execution. FLVS requires the completed implementation shall include delivery of fully functioning Help Desk Services supporting by fully trained agents meeting all stated requirements and all deliverables accepted and approved by FLVS no later than **July 1, 2020**. It is anticipated that the implementation period shall be for a period of 30 days following the contract execution. At the end of the implementation period Respondent shall provide fully functioning services that satisfy the agreed upon Service Levels. The measurement of Service Levels shall commence 31 days following the contract execution date.

Dates provided below are tentative and subject to Board Approval and final award.

#### **December 15, 2020 – Contract Execution Process**

##### **February 1, 2020 - Implementation Plan and Meeting Schedule:**

- Secure contract, develop project charter/schedule with contractor, kick off project
- Resources proposed
- Resources JLA approved
- Train the Trainer scheduled
- Resources satisfy skills assessment
- Disaster Recovery Planning
- Go-live scheduled
- Support plan accepted

**February 2020 - Initial Kick-off Meeting (face-to-face) Launch:** (actual date: to be determined upon execution)

- Training period for Awardee staff

##### **July 1, 2020 - Post Launch (hard date):**

- Post implementation support
  - Tag-up/touch up technical support meetings (Daily meeting)
  - Calibration meetings - bi-weekly or as needed (Phone meeting)

## 8.4 Definitions/URLS/Attachments

1. **ASA:** Average Speed of Answer is the “time a caller rings or is queued in the system before reaching a ‘live’ agent.”
2. **FCR:** First Call Resolution is defined as the “Percent of calls resolved by the [contractor] Help Desk, thereby eliminating the need for escalation to Tier 2.”
3. **Call Abandon Rate:** (aka Negative Abandon Rate) – which is defined as “Customer hangs up without reaching a Help Desk agent. Calls abandoned <60 seconds are excluded from this metric.” Call Abandon Rate does not include if the caller selects the opt-out call back option.
4. **Call/Chat Monitoring Form(s)** – Performance Evaluation Forms for Calls and Chat Sessions (Section 8.6 A & B)
5. **Change Order:** required written notice detailing changes to the Statement of Work including alterations to milestones, deliverables, quantities and cost. Requires issuance of change order/purchase order when there is a fiscal impact.
6. **Contact:** a received communication related to a new or existing incident to the Help Desk via a telephone call (inbound and/or outbound), self-service request, and/or online chat.
7. **CSAT:** Customer Satisfaction is offered at end of every call customer satisfaction survey that is mentioned by an agent.
8. **CRM:** Customer Relation Management System Manages the company's interaction with current and potential customers.
9. **Help Desk Contact:** Defined as a received communication related to a new or existing incident to the Help Desk via a telephone call, self-service request, and/or online chat.
10. **IVR:** Interactive Voice Response – technology that allows a computer to interact with humans through the use of voice and DTMF tones input via keypad.
11. **JLA:** Jessica Lunsford Act - In accordance with Section 1012.465, Florida Statutes, (1) Noninstructional school district employees or contractual personnel who are permitted access on school grounds when students are present, who have direct contact with students or who have access to or control over school funds must meet Level 2 screening requirements as described in s. 1012.3 F.S. Contractual personnel shall include any vendor, individual, or entity under contract with the school board. Background screenings and fingerprinting are required and shall be conducted at the respondent's expense.

Contractual personnel are described as any vendor, individual, or entity under contract with the school board. Subcontractors are considered to also be a contractor with the district for the purpose of the Act. Any employee of an entity under contract with a district would need to be screened.

A Level 2 background check includes fingerprinting the individual and submitting the prints to the Florida Department of Law Enforcement (FDLE) to compare those records against the statewide criminal and juvenile records maintained by the FLDE and federal criminal records maintained through the Federal Bureau of Investigation. It may also include a local criminal record check through local law enforcement agencies.

For more information regarding the Jessica Lunsford Act visit:

<https://info.fl DOE.org/docushore/dsweb/Get/Documents-3151/k12%2005-107a>

12. **Level 1** – Contractor provided support for all FLVS initial contacts including Parent/Student/All FLVS users. This includes first level technical support and customer service information
13. **Level 2** – FLVS advanced and expert technical support when escalations are needed from Level 1
14. **Levels of Criticality:** defined in Section 8.5
15. **Peak Times:** Periods of time with higher call volumes. Higher weekly call volumes occur Mondays and Tuesdays. Peak call seasons that experience significantly higher call volumes are May, June and September.
16. **Purchase Order:** the form or format used to make a purchase under the Contract (e.g., a formal written purchase order, electronic purchase order, procurement card, or other authorized means).
17. **Response:** Acknowledgement of incident submission by contractor to FLVS requestor (FLVS Staff, Student or Parent). Failure to acknowledge a reported incident does not alter defined response times



or resolution and as such may invoke liquidated damages. Contractor retains responsibility for examining the incident and obtaining clarifications needed for full understanding of issue.

18. **Resolution:** Fully delivered solution that solves the reported problem.
19. **SOW** (Statement of Work) identifies the Contractor's Responsibilities including milestones, dates, deliverables, quantities and cost as an attachment to the Master Services Agreement and issuance of purchase order for work to commence.
20. **Warm Transfer:** refers to speaking with a new agent before call is transferred or released. The warm transfer provides opportunity for information sharing prior to handing off the call.
21. **FLVS observes the following holiday schedule per year:**
  - The week of July 4<sup>th</sup>
  - Labor Day
  - Thanksgiving Week (Wednesday through Friday)
  - Winter Break (typically the last two weeks of the calendar year)
  - President's Day
  - Martin Luther King Day
  - Memorial Day

*Actual dates shall vary by calendar year.*

## 8.5 Levels of Criticality (FLVS Shall Provide All Tier 3 Support)

| Priority level | Urgency          | Definition   | Level 1 Support Target Response & Resolution Time   | Level 2 Support Target Response & Resolution Time   |
|----------------|------------------|--|---|---|
| <b>0</b>       | <b>IMMEDIATE</b> | Wellness Incident: Includes any “caller” where they feel the student is in some form of danger, dangerous situation or a similar situation.  | <b>IMMEDIATE:</b> In accordance with FLVS Wellness Guidelines (Section 8.5.A)   | <b>IMMEDIATE:</b> In accordance with FLVS Wellness Guidelines (See Section 8.5.A)   |
| <b>1</b>       | <b>Critical</b>  | A service incident that adversely affects critical systems or user capabilities and for which no workaround is available, therefore requiring an immediate solution.   | Response time:<br>Within 5-10 mins<br>(Phone, self-service ticket)<br>-----<br>Resolution time:<br>4 Business hours<br>(if no escalation is required) | Response time:<br>within 5-15 mins<br>-----<br>Resolution time:<br>30-60 minutes  |
| <b>2</b>       | <b>High</b>      | A service incident that adversely affects systems or user capabilities but does not create an outage of key business tasks. An immediate response is required to communicate workaround or scheduling information, and a resolution must be prioritized as determined by FLVS.   | Response time:<br>Within 5-10 mins<br>(Phone, self-service ticket)<br>-----<br>Resolution time:<br>8 business hours                                   | Response time:<br>within 1 business hour<br>within 8 hours during on-call hours<br>-----<br>Resolution time:<br>2 hours during business hours |
| <b>3</b>       | <b>Moderate</b>  | A service incident that adversely affects a single system or low number of users but does not create an outage of key business tasks. The incident must have a documented workaround and must be scheduled for resolution by a specific day and time.  | Response time:<br>Within 15-45 minutes<br>Self-service tickets:<br>within 4-16<br>-----<br>Resolution time:<br>16 business hours                      | Response time:<br>Within 8 business hours<br>-----<br>Resolution time:<br>16 business hours   |
| <b>4</b>       | <b>Low</b>       | A service incident that affects a non-critical function of a system or that has a low number of reported occurrences. A change request from a user group not represented by the Change Control Board (CCB). The incident should have a documented workaround and the solution is included for prioritization by FLVS IT. | Response time:<br>Within 15-45 minutes<br>Self-service tickets:<br>Within 4-24 hours<br>-----<br>Resolution time:<br>32 business hours                | Response time:<br>Within 8 hours during business hours<br>-----<br>Resolution time:<br>24 business hours                                      |
| <b>5</b>       | <b>Planning</b>  | Category for feature requests that are pending Change Control Board (CCB) approval.  | NA  | NA  |



### **8.5. A HOW TO: Report Student Wellness Concerns**

**CELL PHONES LISTED BELOW ARE ONLY TO BE USED BY CENTER STAFF DURING THIS  
PROTOCOL ANY OTHER USE FOR THEM IS STRICTLY PROHIBITED**

The following process is required when reporting student wellness concerns. Designated contacts listed below are at the sole discretion of FLVS and may be subject to change.

#### **Full-Time Program:**

1. Contact the student's local law enforcement IMMEDIATELY (not 911) and request a wellness check.  
**(DO NOT CONTACT FLVS CUSTOMER CARE TEAM OR SUPERVISOR FIRST)**
2. Contact the Principal via telephone to inform them of the situation.
  - a. High School – Kenneth Henson
    - i. **863 – 288 - 0529 (w) – work forwards to cell**
    - ii. **863 – 528 – 2911 (c)**
  - b. Middle School – Jessica Smith
    - i. **352-508-7055 (w)**
  - c. Elementary School – Marc Rummler
    - i. **407-680-3488 (w)**
    - ii. **407-923-5901 (c)**
3. Submit a ticket using the “Student Wellness Report” template to the FLVSFT Group assigned to the Principal for the student
  - a. Be sure to be as detailed as possible
4. Inform Supervisor of the call.
5. Inform FLVS Customer Care team (Manager & all technicians)

#### **Flex Program:**

1. Contact the student's local law enforcement (not 911) and request a wellness check.
2. Contact the Instructional Leader (IL) to inform them of the situation.
3. Submit a ticket using the “Student Wellness Report” template to the IL
  - a. Be sure to be as detailed as possible
4. Inform Supervisor of the call.

## 8.6 A Chat Monitoring Performance Evaluation Form

| FLVS CHAT EVALUATION FORM  |             |                 |             |                                   |              |
|--|-------------|-----------------|-------------|-----------------------------------|--------------|
| Call Reference:  |             | Disposition:    |             | Language:                         |              |
| Agent:   |             | Score:          |             | Time:                             |              |
| Date of Call:  |             | Evaluator:      |             | Acct/Ticket#                      |              |
| Communications/Soft Skills/Professionalism   | Point Value | Possible Points | Met         | Points Earned                     | Comments     |
| Courtesy and Assurance   | 10          | 10              | YES         | 10                                |              |
| Expressed empathy/sympathy as appropriate  | 5           | 5               | NO          | 5                                 |              |
| Displayed professionalism (i.e. stayed on topic, no personal comments or negativity) | 10          | 10              | YES         | 10                                |              |
| Used correct grammar and spelling  | 10          | 10              | YES         | 10                                |              |
| Used correct canned responses when needed  | 10          | 10              | YES         | 10                                |              |
| Probing Questions and Accuracy   | Point Value | Possible Points | Met         | Points Earned                     | Comments     |
| Probed for Account (if applicable)   | 15          | 15              | YES         | 15                                |              |
| Verified customer information  | 5           | 5               | YES         | 5                                 |              |
| Program knowledge and policy/procedure   | 15          | 15              | YES         | 15                                |              |
| Technical  | Point Value | Possible Points | Met         | Points Earned                     | Comments     |
| Incident Complete & Accurate, Assignment/Notation for Service Now                    | 10          | 10              | YES         | 10                                |              |
| Closing  | Point Value | Possible Points | Met         | Points Earned                     | Comments     |
| Used FLVS preferred closing  | 5           | 5               | YES         | 5                                 |              |
| Used the correct disposition   | 5           | 5               | YES         | 5                                 |              |
| <b>TOTALS</b>  |             |                 |             |                                   |              |
| <b>QUALITY SCORE</b>   |             | <b>100%</b>     | <b>100%</b> |                                   |              |
| <b>Agent Comments:</b>   |             |                 |             |                                   |              |
| <b>Agent Signature:</b>  |             |                 |             | <b>Quality Scoring Guidelines</b> |              |
|  |             |                 |             | <b>Exceeds:</b>                   | 95% or above |
|  |             |                 |             | <b>Meets:</b>                     | 90% - 95%    |
| <b>Date:</b>   |             |                 |             | <b>Below:</b>                     | 90% or below |

## 8.6 B Call Monitoring Performance Evaluation Form

| Performance Evaluation Form – Call Monitoring FLVS CALL MONITORING FORM |                    |                        |                  |                                   |                 |
|---|--------------------|------------------------|------------------|-----------------------------------|-----------------|
| Call Reference:   |                    | Disposition:           |                  | Language:                         |                 |
| Agent:  |                    | Score:                 |                  | Time:                             |                 |
| Date of Call:   |                    | Evaluator:             |                  | Acct/Ticket#                      |                 |
| <b>Auto Fail/Zero % Offenses</b>  |                    |                        | <b>Committed</b> |                                   | <b>Comments</b> |
| Hanging up on a Caller  |                    |                        | NO               |                                   |                 |
| CSR did not create an incident to document call                         |                    |                        | NO               |                                   |                 |
| CSR was rude or used profanity  |                    |                        | NO               |                                   |                 |
| <b>Customer Connection</b>  | <b>Point Value</b> | <b>Possible Points</b> | <b>Met</b>       | <b>Points Earned</b>              | <b>Comments</b> |
| Courtesy and Professionalism  | 10                 | 10                     | YES              | 10                                |                 |
| Verified Customer Information   | 10                 | 10                     | YES              | 10                                |                 |
| Call Control  | 10                 | 10                     | YES              | 10                                |                 |
| <b>Program/Policy Knowledge &amp; Accuracy</b>                          | <b>Point Value</b> | <b>Possible Points</b> | <b>Met</b>       | <b>Points Earned</b>              | <b>Comments</b> |
| Program Knowledge & Policy/Procedure,                                   | 20                 | 20                     | YES              | 20                                |                 |
| Effective Probing   | 20                 | 20                     | YES              | 20                                |                 |
| <b>Technical</b>  | <b>Point Value</b> | <b>Possible Points</b> | <b>Met</b>       | <b>Points Earned</b>              | <b>Comments</b> |
| Incident Complete & Accurate, Assignment/Notation for Service Now       | 10                 | 10                     | YES              | 10                                |                 |
| <b>Accountability</b>   |                    |                        |                  |                                   |                 |
| Reviewed Account/First Call Resolution & Accountability                 | 10                 | 10.                    | YES              | 10                                |                 |
| Closed Call with Assurance  | 5                  | 5                      | YES              | 5                                 |                 |
| Disposition   | 5                  | 5                      | YES              | 5                                 |                 |
| <b>TOTALS</b>   |                    |                        |                  |                                   |                 |
| <b>QUALITY SCORE</b>  |                    | <b>100%</b>            | <b>100%</b>      |                                   |                 |
| <b>Agent Comments:</b>  |                    |                        |                  |                                   |                 |
| <b>Agent Signature:</b>   |                    |                        |                  | <b>Quality Scoring Guidelines</b> |                 |
|   |                    |                        |                  | <b>Exceeds:</b>                   | 95% or above    |
|   |                    |                        |                  | <b>Meets:</b>                     | 90% - 95%       |
| <b>Date:</b>  |                    |                        |                  | <b>Below:</b>                     | 90% or below    |
|   |                    |                        |                  |                                   |                 |

- 8.7 **Exceptions to the RFP Note:** FLVS reserves the right to reject proposals with exceptions to the requirements of this RFP and /or take the exceptions into consideration when evaluating.

| No. | Summary of Exception | Exception to Paragraph or Requirement Number |
|-----|----------------------|--|
|     |                      |  |
|     |                      |  |
|     |                      |  |
|     |                      |  |

8.8 **ALTERNATIVES TO THE SCOPE OF WORK**

| No. | Summary of Alternative | Alternative to SOW Paragraph Number |
|-----|------------------------|-------------------------------------|
|     |                        |                                     |
|     |                        |                                     |
|     |                        |                                     |
|     |                        |                                     |

## 9.0 PROPOSAL PRICE SHEET

**9.1 Cost Proposal Form:** Respondents shall complete the following table providing a 1-year sub-total for specified deliverables and services for all applicable line items. All respondents are required to complete this section as shown. Estimated quantities are based upon historical usage, actual quantities shall vary. This section shall be used for evaluation purposes.

**Per Contact Service Fee:** (per contact model) – FLVS is seeking fixed fees 'per contact' pricing. Average handle time per contact is six and one half (6 ½) minutes per contact as determined by historical usage. All quantities (volumes of contacts) are estimated and could be higher or lower based upon actual call volumes.

### 9.1.A

| Description  | Estimated Quantity (Per Year) | Unit of Measure | Unit Cost | Extended Cost |
|--|-------------------------------|-----------------|-----------|---------------|
| All Service Contacts (Average Handle time 6 ½ minutes) | 630,000                       | Per Contact     | \$ _____  | \$ _____      |

### 9.1.B

| Description of Services  | Cost     |
|--|----------|
| Provide all one-time costs associated with Training (Train-the-trainer program) and Implementation Services (Section 8.2.A.3). | \$ _____ |

### 9.1.C

| Description                            | Cost     |
|--|----------|
| Total Cost for Section A and Section B | \$ _____ |

*This total to be used for evaluation purposes.*

**9.2 Alternative Pricing:** May be provided in Addition to Fixed Price (not as a replacement to) for a 1- year period.

| Detailed Description | Total Five-Year Total |
|----------------------|-----------------------|
|                      |                       |
|                      | \$ _____              |

### 9.3 Additional Services (optional)

Respondents shall provide rates for additional related services not specified in the scope of services. For additional available services, provide a detailed description of service along with associated rates. FLVS shall at its discretion exercise the right to purchase any proposed additional services as needed. Additional services proposed shall not factor into the evaluation process. Respondent shall specific any additional services offered:

### 9.4 P-Card Acceptance

Respondent shall accept payment via P-Card (with no additional Fees)

☐ Yes ☐ No  
(Check one)

### 9.5 Cost Proposal General Notes:

- Unit price will be used to determine the correct extended price if calculation error is found.
- Extended price should be computed as Estimated Total Hours multiplied by the Proposed Unit Price

- All quantities are estimated and could be higher or lower at the discretion of FLVS in accordance with the Statement of Work. Estimated quantities provided for evaluation purposes and do not guarantee dollar value of award.
- FLVS reserves the right to make award(s) by individual item, group of items, all or none or a combination thereof; to reject any and/or all Bids or to waive any minor irregularity or technicality. Responders are cautioned to make no assumptions unless their proposal has been evaluated as being responsive. Cash discounts for prompt payment shall not be considered in determining the lowest net cost for bid evaluation purposes.
- FLVS Travel Policy  
In compliance with 112.061, Florida Statutes, FLVS will reimburse contractors following the same policy that is set in place for all FLVS staff for ordinary, necessary, and reasonable expenses incurred in the course of business-related travel in compliance with Florida State Law, based upon the rates established in sections 112.061(3),(6),(7), Florida Statute s. Travel expenses must be supported by receipts when submitting a Contractor Travel and Expense Reimbursement Form. Florida Virtual School will only reimburse up to what is considered acceptable based on FLVS travel policy.

## 10. REFERENCES

I \_\_\_\_\_ being of \_\_\_\_\_

(Name/Title)

(Name of Company)

Hereby give Florida Virtual School authorization to check our company's previous performance.

Authorizing Signature \_\_\_\_\_

NOTE: All references shall be contacted via an online web form. If you wish to see a copy of the questions contact the procurement personnel listed on page one (1) of this document.

### REFERENCE 1.

COMPANY NAME:

COMPANY ADDRESS:

CONTACT PERSON:

PHONE NUMBER:

FACSIMILE NUMBER:

EMAIL:

### REFERENCE 2.

COMPANY NAME:

COMPANY ADDRESS:

CONTACT PERSON:

PHONE NUMBER:

FACSIMILE NUMBER:

EMAIL:

### REFERENCE 3.

COMPANY NAME:

COMPANY ADDRESS:

CONTACT PERSON:

PHONE NUMBER:

FACSIMILE NUMBER:

EMAIL:

# Appendix A

## Contractor's Statement of Qualification

Provide written responses to the following questions. If the answer to any of the questions is "Yes", Contractor shall describe fully the circumstances, reasons therefore, the current status, and ultimate disposition of each matter that is the subject of this inquiry.

1. Has Contractor been declared in default of any contract? ☐ Yes or ☐ No
2. Has Contractor forfeited any payment of performance bond issued by a surety company on any contract? ☐ Yes or ☐ No
3. Has an uncompleted contract been assigned by Contractor's surety company on any payment of performance bond issued to Contractor arising from its failure to fully discharge all contractual obligations thereunder? ☐ Yes or ☐ No
4. Within the past three (3) years, has Contractor filed for reorganization, protection from creditors, or dissolution under the bankruptcy statutes? ☐ Yes or ☐ No
5. Is Contractor now the subject of any litigation in which an adverse decision might result in a material change in the firm's financial position or future viability? ☐ Yes or ☐ No
6. Is Contractor currently involved in any state of a fact-finding, negotiations, or resistance to a merger, friendly acquisition, or hostile take-over, either as a target or as a pursuer? ☐ Yes or ☐ No
7. License Sanctions: List any regulatory or license agency sanctions. The Board may perform a background check on Proposer with all state and regulatory agencies. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Provide the following financial information:

|          |   |
|----------|---|
| \$ _____ | Earnings before Interest & Taxes                  |
| \$ _____ | Total Assets                                      |
| \$ _____ | Net Sales   |
| \$ _____ | Market Value of Equity (Common & Preferred Stock) |
| \$ _____ | Total Liabilities                                 |
| \$ _____ | Current Assets                                    |
| \$ _____ | Current Liabilities                               |
| \$ _____ | Retained Earnings                                 |

\_\_\_\_\_  
Authorized Representative's Signature

\_\_\_\_\_  
Company Name

Access the FLVS Vendor Application, Commodity Codes and W-9 form at:

<https://www.flvs.net/about/procurement-opportunities/vendor-application>



## Appendix B

### ACKNOWLEDGEMENT OF BUSINESS TYPE

This form must be signed in the presence of a Notary Public or other officer authorized to administer oaths and submitted with the bid on the specified due date and time. The undersigned Bidder certifies that this proposal package is submitted in accordance with the scope of services in its entirety and with full understanding of the conditions governing this proposal. The Bidder further declares that he/she has carefully examined the scope of services, instructions, terms and conditions of this Invitation to Bid and that Bidder's proposal is made according to the provisions of the bid and that he/she will meet or exceed the scope of services, requirements, and standards contained in the Invitation to Bid.

#### Business Address of Proposer:

Address \_\_\_\_\_

City, State, Zip Code \_\_\_\_\_

Telephone No. \_\_\_\_\_ Fax No. \_\_\_\_\_

#### Signature of Proposer:

☐ If an Individual: \_\_\_\_\_  
Signature

doing business as \_\_\_\_\_

☐ If a Partnership: \_\_\_\_\_  
Name of Partnership

by: \_\_\_\_\_  
Partner Signature

☐ If a Corporation: \_\_\_\_\_  
Corporate Name

(a \_\_\_\_\_ Corporation) In what State is the Corporation Incorporated? \_\_\_\_\_

If not incorporated under the laws of Florida, are you licensed to do business in Florida? Yes \_\_\_\_ No \_\_\_\_

by: \_\_\_\_\_ Title: \_\_\_\_\_  
Signature

Attest: \_\_\_\_\_ (SEAL)

Corporate Secretary

#### NOTARY PUBLIC

State Of: \_\_\_\_\_ County Of: \_\_\_\_\_

On this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, before me appeared (name) \_\_\_\_\_ who is personally known to me or who has produced \_\_\_\_\_ as identification sworn, did execute the foregoing affidavit, and did state that he or she was properly authorized by (name of firm) \_\_\_\_\_, to execute the affidavit and did so as his or her free act and deed.

Notary Public Signature: \_\_\_\_\_ Notary Name, Printed, Typed or Stamped: \_\_\_\_\_

Commission Number: \_\_\_\_\_ My Commission Expires: \_\_\_\_\_

## Appendix C

### STATEMENT OF AFFIRMATION AND INTENT

TO: FLORIDA VIRTUAL SCHOOL, PROCUREMENT DIVISION

PROJECT: \_\_\_\_\_

DATE: \_\_\_\_\_

The undersigned, hereinafter called the Proposer, declares that the only persons, or parties interested in their Response are those named herein, that this Response is, in all respects, fair and without fraud that it is made without collusion with any other vendor or official of Florida Virtual School. Neither the Affiant nor the above named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive pricing in connection with the entity's submittal for the above project. This statement restricts the discussion of pricing data until the completion of negotiations and execution of the Agreement for this project.

The Proposer certifies that no Board Member, Director, or any Florida Virtual School Employee directly or indirectly owns assets or capital stock of the bidding entity, nor will directly or indirectly benefit by the profits or emoluments of this Response. (For purposes of this paragraph, indirect ownership or benefit does not include ownership or benefit by a spouse or minor child.)

The Proposer certifies that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the School. In the event that a conflict of interest is identified in the provision of services, the Proposer agrees to immediately notify FLVS in writing.

The Proposer further declares that he/she has carefully examined the scope of services, instructions, terms and conditions of this Request for Proposal and that Proposer's Response is made according to the provisions of the RFP and that he/she will meet or exceed the scope of services, requirements, and standards contained in the Request for Proposals.

The Proposer agrees to abide by all conditions of the negotiation process. In conducting negotiations with FLVS, Proposer offers and agrees that if this negotiation is accepted, the Proposer will convey, sell, assign, or transfer to FLVS all rights, title, and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by FLVS. At the School's discretion, such assignment shall be made and become effective at the time the School tenders final payment to the Proposer. The Response constitutes a firm and binding offer by the Proposer to perform the services as stated.

Proposer acknowledges that all information contained herein is part of the public domain as defined in the Public Records Act, Chapter 119, F.S.

The signer of this Response guarantees, as evidence of the sworn affidavit required herein, the truth and accuracy of all statements and information hereinafter provided. The undersigned hereby authorizes any public official, surety company, bank depository, material, or equipment manufacturer or distributor or any person or firm or corporation to furnish any pertinent information requested by Florida Virtual School or their representative, deemed necessary to verify the information provided and statements made regarding the standing and general reputation of the applicant.

\_\_\_\_\_  
Signature of Authorized Firm Representative

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name and Title of Authorized Firm Representative (Typed)

\_\_\_\_\_  
E-mail Address

\_\_\_\_\_  
Name of Firm (Typed)

\_\_\_\_\_  
Address, City, Zip

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Fax Number

Sworn to and subscribed before me this \_\_\_\_ day \_\_\_\_\_ of 20\_\_.

\_\_\_\_\_  
Notary Public

\_\_\_\_\_  
Commission Expiration Date

## APPENDIX D

### MUTUAL NONDISCLOSURE AGREEMENT

This Mutual Nondisclosure Agreement (this "*Agreement*") is made and entered into as of [REDACTED] by and between Florida Virtual School, a state of Florida entity, and [REDACTED] (referred to from this point as "*Company*"). Florida Virtual School (FLVS) and the Company agree as follows:

1. Purpose. The parties wish to explore a business opportunity of mutual interest and in connection with this opportunity, each party may disclose to the other certain confidential technical and business information that the disclosing party desires the receiving party to treat as confidential.
2. "Confidential Information" means any information disclosed by either party to the other party, either directly or indirectly, in writing, orally or by inspection of tangible objects (including without limitation documents, prototypes, samples, plant and equipment), which is designated as "Confidential," "Proprietary" or some similar designation. Information communicated orally shall be considered Confidential Information if such information is confirmed in writing as being Confidential Information within a reasonable time after the initial disclosure. Confidential Information may also include information disclosed to a disclosing party by third parties. Confidential Information shall not, however, include any information which: (i) was publicly known and made generally available in the public domain prior to the time of disclosure by the disclosing party; (ii) becomes publicly known and made generally available after disclosure by the disclosing party to the receiving party through no action or inaction of the receiving party; (iii) is already in the possession of the receiving party at the time of disclosure by the disclosing party as shown by the receiving party's files and records immediately prior to the time of disclosure; (iv) is obtained by the receiving party from a third party without a breach of such third party's obligations of confidentiality; (v) is independently developed by the receiving party without use of or reference to the disclosing party's Confidential Information, as shown by documents and other competent evidence in the receiving party's possession; or (vi) is required by law to be disclosed by the receiving party, provided that the receiving party gives the disclosing party prompt written notice of such requirement prior to such disclosure and assistance in obtaining an order protecting the information from public disclosure.
3. Non-use and Non-disclosure. Each party agrees not to use any Confidential Information of the other party for any purpose except to evaluate and engage in discussions concerning a potential business relationship between the parties. Each party agrees not to disclose any Confidential Information of the other party to third parties or to such party's employees, except to those employees of the receiving party who are required to have the information in order to evaluate or engage in discussions concerning the contemplated business relationship. Neither party shall reverse engineer, disassemble or decompile any prototypes, software or other tangible objects which embody the other party's Confidential Information and which are provided to the party hereunder.
4. Maintenance of Confidentiality. Each party agrees that it shall take reasonable measures to protect the secrecy of and avoid disclosure and unauthorized use of the Confidential Information of the other party. Without limiting the foregoing, each party shall take at least those measures that it takes to protect its own most highly confidential information and shall ensure that its employees who have access to Confidential Information of the other party have signed a non-use and non-disclosure agreement in content similar to the provisions hereof, prior to any disclosure of Confidential Information to such employees. Neither party shall make any copies of the Confidential Information of the other party unless the same are previously approved in writing by the other party. Each party shall reproduce the other party's proprietary rights notices on any such approved copies, in the same manner in which such notices were set forth in or on the original.
5. No Obligation. Nothing herein shall obligate either party to proceed with any transaction between them, and each party reserves the right, in its sole discretion, to terminate the discussions contemplated by this Agreement concerning the business opportunity.
6. No Warranty. ALL CONFIDENTIAL INFORMATION IS PROVIDED "AS IS". EACH PARTY MAKES NO WARRANTIES, EXPRESS, IMPLIED OR OTHERWISE, REGARDING ITS ACCURACY, COMPLETENESS OR PERFORMANCE.
7. Return of Materials. All documents and other tangible objects containing or representing Confidential Information which have been disclosed by either party to the other party, and all copies thereof which are in the possession of the other party, shall be and remain the property of the disclosing party and shall be promptly returned to the disclosing party upon the disclosing party's written request.
8. No License. Nothing in this Agreement is intended to grant any rights to either party under any patent, mask work right or copyright of the other party, nor shall this Agreement grant any party any rights in or to the Confidential Information of the other party except as expressly set forth herein.
9. Term. The obligations of each receiving party hereunder shall survive until such time as all Confidential Information of the other party disclosed hereunder becomes publicly known and made generally available through no action or inaction of the receiving party.
10. Remedies. Each party agrees that any violation or threatened violation of this Agreement may cause irreparable injury to the other party, entitling the other party to seek injunctive relief in addition to all legal remedies.
11. Solicitation of Employees. Each Party (FLVS and Contractor) agrees that, during the Term of this Agreement and for a period of twelve months following the termination of this Agreement for any reason, such Party shall not, directly or indirectly, on its own behalf or as a representative of any other person or entity, solicit or induce any employee of the other Party to terminate his or her employment relationship or to enter into employment with any other person or entity.

12. Public Records. Florida Virtual School is a public agency subject to Chapter 119, Florida Statutes. The Contractor shall comply with Florida's Public Records Law including: (a) keeping and maintaining public records that ordinarily and necessarily would be required by the BOARD in order to perform the service; (b) providing the public with access to public records on the same terms and conditions that the BOARD would provide the records and at a cost that does not exceed the cost provided in chapter or as otherwise provided by law; (c) ensuring that public records that are exempt or that are confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and (d) meeting all requirements for retaining public records and transfer at no cost to the BOARD, all public records in possession of the contractor upon termination of the Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the BOARD in a format that is compatible with the information technology systems of the BOARD. The parties agree that if the contractor fails to comply with a public records request, then Florida Virtual School must enforce the contract provisions in accordance with the contract and as required by Section 119.0701, Florida Statutes.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT, CustodianofRecords@flvs.net , OR BY PHONE 407-513-3325, OR BY MAIL TO: 2145 METROCENTER BLVD., SUITE 100, ORLANDO, FL 32835.**

13. Miscellaneous. This Agreement may be executed in one or more counterparts, each of which shall be an original and all of which together shall constitute one instrument. This Agreement shall bind and inure to the benefit of the parties hereto and their successors and assigns. This Agreement shall be governed by the laws of the State of Florida, without reference to conflict of laws principles. In any action arising out of or related to this Agreement, the parties hereto consent to the exclusive jurisdiction and venue in the courts located in the Orange County of Florida. This document contains the entire agreement between the parties with respect to the subject matter hereof, and neither party shall have any obligation, express or implied by law, with respect to trade secret or proprietary information of the other party except as set forth herein. Any failure to enforce any provision of this Agreement shall not constitute a waiver thereof or of any other provision. This Agreement may not be amended, nor any obligation waived, except by a writing signed by both parties hereto.

IN WITNESS WHEREOF, the parties have caused this Mutual Nondisclosure Agreement to be executed by their duly authorized representatives as of the date first written above.

**Florida Virtual School**

Signature:

Print Name:

Title:

Date:

**Company**

Signature:

Print Name:

Title:

Company/  
School/District:

Phone Number:

Email:

Date:

## **Appendix E**

### **ADDENDA FORM**

The signer of this response guarantees, as evidence by the sworn affidavit required herein, the truth and accuracy of all statements and of all answers to interrogatories hereinafter made.

The undersigned hereby authorizes any public official, engineer, architect, surety company, bank depository, material or equipment manufacturer or distributor or any person, firm or corporation to furnish any pertinent information requested by Florida Virtual School or their representative, deemed necessary to verify the statements made in this qualification form or regarding the standing and general reputation of the applicant. The signer also states that all information given is an accurate representation of the office location and resources from where the services are to be rendered.

Receipts of the following Addenda are hereby acknowledged: (List all Addenda as follows):

|                       |       |       |       |
|-----------------------|-------|-------|-------|
| ADDENDUM NO           | _____ | Dated | _____ |
| ADDENDUM NO           | _____ | Dated | _____ |
| ADDENDUM NO           | _____ | Dated | _____ |
| Date:                 | _____ |       | _____ |
| Name of Organization: | _____ |       |       |
| Name:                 | _____ |       |       |
| Title                 | _____ |       |       |
| Signature             | _____ |       |       |

---

### **DISPUTE RESOLUTION CLAUSE**

In the event a dispute occurs, or a clarification of minor contract terms becomes necessary, indicate your Proposer representative.

Representative's Name:

\_\_\_\_\_

Telephone Number:

\_\_\_\_\_

FLVS representative will be the Procurement Director.

**Appendix F**  
**FAIR LABOR STANDARDS ACT - "HOT GOODS"**

The undersigned hereby certify that these goods are or will be produced in compliance with all applicable requirements of sections 6, 7, and 12 of the Fair Labor Standards Act, as amended, and of regulations and orders of the United States Department of Labor issued under section 14 thereof.

The undersigned shall be required to stamp or print such certifications on the invoices which covers the resalable goods shipped, and which are furnished to the School District.

Company Official Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

---

**PUBLIC ENTITY CRIMES**

Per the provisions of Florida Statute 287.133 (2) (A), "A person or affiliate who has been placed on the convicted Vendor(s) list following a conviction for a public entity crime may not submit a response on a contract to provide any goods or services to a public entity, may not submit a response on a contract with a public entity for the construction or repair of a public building or public work, may not submit responses on leases of real property to a public entity, may not be awarded or perform work as a Vendor(s), supplier, sub-vendor(s) or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statute 287.017 for category two for a period of 36 months from the date of being placed on the convicted Vendor(s) list."

Company Official Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

---

**FEDERAL DEBARMENT CERTIFICATION**

Certification regarding debarment, suspension, ineligibility and voluntary exclusion.

The prospective lower tier (\$25,000) participant certifies, by submission of this response, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal department or agency.

Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this response.

Company Official Signature: \_\_\_\_\_  
Date: \_\_\_\_\_

## **Appendix G**

### **DRUG-FREE WORKPLACE CERTIFICATION**

Tie response preference shall be given to businesses with drug-free workplace programs. Whenever two or more responses, which are equal with respect to price, quality and service, are received by the State or by any political subdivision for the procurement of commodities or contractual services, a response received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie responses will be followed if none of the tied Awardee(s) have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace, and specifying the actions that will be taken against employees for violations of such prohibition.

Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

Give each employee engaged in providing the commodities or contractual services that are under response a copy of the statement specified in subsection (1).

In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under response, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States, or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.

Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

**AS THE PERSON AUTHORIZED TO SIGN THE STATEMENT, I CERTIFY THAT THIS COMPANY COMPLIES FULLY WITH THE ABOVE DRUG-FREE WORKPLACE REQUIREMENTS.**

Company Official Signature: \_\_\_\_\_

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



## **Appendix H**

### **PUBLIC RECORDS ACT/CHAPTER 119 REQUIREMENTS**

Florida Virtual School is a public agency subject to Chapter 119, Florida Statutes. The Contractor shall comply with Florida's Public Records Law including:

1. Keeping and maintaining public records that ordinarily and necessarily would be required by the Board in order to perform the service.
2. Providing the public with access to public records on the same terms and conditions that the BOARD would provide the records and at the cost that does not exceed the cost provided in Chapter 119, Florida Statutes or as otherwise provided by law.
3. Ensuring that public records that are exempt or that are confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and
4. Meeting all requirements for retaining public records and transfer at no cost to the BOARD, all public records in possession of the Contractor upon termination of the Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the BOARD in a format that is compatible with the information technology systems of the BOARD.

The parties agree that if the contractor fails to comply with a public records request, then Florida Virtual School must enforce the contract provisions in accordance with the contract and as required by Section 119.0701, Florida Statutes.

Company Official Signature:

Date:

Proposing agency shall specify any exceptions to Public Records Act/Chapter 119 Requirement by including a detailed justification of the applicable content to be redacted for exemption. All exemptions must be stated specifically according to the Statute. Exceptions shall be reviewed for compliance. Contractor is responsible for defending all exemptions.

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**Appendix I**  
**CERTIFICATION REGARDING ANTI-LOBBYING**

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Certification for Contracts, Grants, Loans, and Cooperative Agreements  
(To be submitted with each bid or offer exceeding \$100,000)

The undersigned [Contractor] certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or shall be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or shall be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions [as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96). Note: Language in paragraph (2) herein has been modified in accordance with Section 10 of the Lobbying Disclosure Act of 1995 (P.L. 104-65, to be codified at 2 U.S.C. 1601, *et seq.*)]

(3) The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

[Note: Pursuant to 31 U.S.C. § 1352(c)(1) -(2)(A), any person who makes a prohibited expenditure or fails to file or amend a required certification or disclosure form shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such expenditure or failure.]

The Contractor, \_\_\_\_\_, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. A 3801, *et seq.*, apply to this certification and disclosure, if any.

Signature of Contractor's Authorized Official: \_\_\_\_\_

Name and Title of Contractor's Authorized Official: \_\_\_\_\_

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

### COMPLIANCE WORKSHEET – APPENDIX J

Formal Company Name: \_\_\_\_\_

Business Address: \_\_\_\_\_

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

Type of Business (*check one*):

Sole Proprietorship: ☐ Partnership: ☐ Corporation: ☐ Joint Venture: ☐ Other (specify): \_\_\_\_\_

Incorporated in the State of Florida Yes: ☐ No: ☐ If "No" specify where incorporated: \_\_\_\_\_

Copy of certification from Florida Secretary of State  
providing corporate status attached Yes: ☐ No: ☐

Out of State corporation: Florida Business  
License attached: Yes: ☐ No: ☐

Location of Corporate Office: \_\_\_\_\_

Office Locations: Orange County: ☐ Central Florida: ☐ or contiguous county: ☐

Federal Employer Identification  
Number: \_\_\_\_\_

Number of Active Clients: \_\_\_\_\_

Number of Active Clients (past 5 years)

Number of Inactive Clients: \_\_\_\_\_

2018

2017

2016

2015

2014

Number of Clients Past 5 Years: \_\_\_\_\_

Number of Years in Business: \_\_\_\_\_

License Sanctions (if any): \_\_\_\_\_

Debarments (if any): \_\_\_\_\_

History of changes to ownership: \_\_\_\_\_

#### Financial Stability Compliance & Qualifications

Indicate type of supporting document included with your proposal in accordance with Section 3.2.1.

☐ Statement from Certified Accountant

☐ Dun & Bradstreet Report or SER

☐ Certified Financial Statements and/or Tax Returns

☐ Annual Report ☐ Ratios

#### Authorized Parties

| <u>Primary Contact Information</u> | <u>Principals &amp; Authorized Signatures</u> |
|------------------------------------|---|
| Name: _____                        | Name: _____                                   |
| Title: _____                       | Title: _____                                  |
| Address: _____                     | Name: _____                                   |
| Telephone: _____                   | Title: _____                                  |
| Email: _____                       |   |

#### Contractor Certification and/or License (if applicable)

| Certifying or Licensing Agency | Description of License or Certification | License or Cert. Number or ID |
|--------------------------------|---|-------------------------------|
|                                |   |                               |
|                                |   |                               |

#### FERPA

If Contractor is provided access to any student personally identifiable information (as defined under FERPA), Contractor acknowledges that it will comply with the privacy regulations outlined in the Family Educational Rights and Privacy Act ("FERPA"), for the handling of such information, to the extent such regulations apply to Contractor. Contractor will not disclose or use any student information except to the extent necessary to carry out its obligations under its agreement as permitted by FERPA.

Company: \_\_\_\_\_

Authorized Representative's Name: \_\_\_\_\_

Authorized Representative's Signature: \_\_\_\_\_

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

## Appendix K COMPLIANCE CHECK LIST

### Authorized Parties and Contact Information

|  |  |
|--|--|
| Primary Contact Details (name, address, telephone, email)                  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| List of persons authorized signatures for proposing organization attached. | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |

### Appendix and Attachment Check List

| Appendix         | Description  | Attached   |
|------------------|--|--|
| Section 2.b      | Cover Letter   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 3        | ADA Compliance ACR/SAR/Internal Plan   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 3        | Qualifications, Experience and References (including 3 letters of reference) | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 3        | Methodology & Staffing Plan  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 8        | Requirements Table   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 8        | Respondent Questionnaire   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 9        | Cost Proposal & P Card Acceptance Response                                   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Section 4        | Submission Label (affixed to outside of package)                             | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix A       | Contractor's Statement of Qualifications                                     | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix B       | Acknowledgement of Type of Business  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix C       | Statement of Affirmation and Intent  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix D       | Mutual Non-Disclosure Agreement  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix E       | Addenda Form / Dispute Resolution Clause                                     | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix F       | Fair Labor Act / Public Crimes / Federal Debarment Certifications            | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix G       | Drug Free Work Place Certification   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix H       | Public Records Act / Chapter 119 Requirements                                | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| (Section 6.18)   | Certificate of Insurance (with active/adequate coverage)                     | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix I       | Anti-Lobbying Certification  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix J       | Compliance Worksheet   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix K       | Requirements Checklist   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| (Section 3.3.1)  | Financial Stability Compliance including Ratios                              | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| (Section 8.8)    | Exceptions / Alternatives  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| (See Appendix A) | Vendor Application Form  | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |
| Appendix L       | Sample FLVS Terms and Conditions   | Yes: <input type="checkbox"/> No: <input type="checkbox"/> |

Comments/Notes:



**SAMPLE FLORIDA VIRTUAL SCHOOL  
Standard Master Service Contract Form**

|                    |                     |                 |
|--------------------|---------------------|-----------------|
| Solicitation Title | Solicitation Number | Contract Number |
|--------------------|---------------------|-----------------|

1. This Contract is entered into between FLVS and the Contractor named below:

|  |                         |
|--|-------------------------|
| Entity Name<br><b>Florida Virtual School</b> | (hereafter called FLVS) |
|--|-------------------------|

|                   |                               |
|-------------------|-------------------------------|
| Contractor's Name | (hereafter called Contractor) |
|-------------------|-------------------------------|

2. Contract to Begin:                      Date of Completion:                      Renewals:

3. Performance Bond, if any:                      Other Bonds, if any:

4. Maximum Amount of this Contract: \$

|   |   |
|---|---|
| Authorized Person to Receive Contract Notices for FLVS: | Authorized Person to Receive Contract Notices for Contractor: |
|---|---|

6. The parties agree to comply with the terms and conditions of the following attachments which are by this reference made a part of the Contract:

|   |
|---|
| Attachment 1 – <b>FLVS Standard Master Service Contract Terms and Conditions for Services</b> |
| Attachment 2 – <b>Solicitation (referenced above)</b>   |
| Attachment 3 – <b>Solicitation (referenced above) Addendum</b>                                |
| Attachment 4 – <b>Contractor's Final Response</b>   |
| Attachment 5 – <b>Statements of Work (SOW) &amp; Change Orders</b>                            |
| Attachment 6 – <b>Contract Renewal Amendments (if any)</b>                                    |

**IN WITNESS, WHEREOF, this Contract has been executed by the parties hereto.**

7. **Contractor**

Contractor's Name *(If other than an individual, state whether a corporation, partnership, etc.)*

|                                  |             |
|----------------------------------|-------------|
| By <i>(Authorized Signature)</i> | Date Signed |
|----------------------------------|-------------|

Printed Name and Title of Person Signing

Address

8. **FLVS**

FLVS Name  
**Florida Virtual School**

|                                  |             |
|----------------------------------|-------------|
| By <i>(Authorized Signature)</i> | Date Signed |
|----------------------------------|-------------|

Printed Name and Title of Person Signing

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Address

**2145 Metrocenter Blvd. Orlando, Florida 32835**

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**FLORIDA VIRTUAL SCHOOL**  
**STANDARD MASTER SERVICE CONTRACT**  
**Attachment 1**  
**Contract Terms and Conditions for Services**

**1. DEFINITIONS AND GENERAL INFORMATION**

**1.1 Definitions.** The following words shall be defined as set forth below:

- (i) **"FLVS"** means Florida Virtual School or the entity identified in the Standard Master Service Contract Form to contract with the Contractor for the Services identified in the Contract.
- (ii) **"FLVS Standard Master Service Contract" or "Contract"** means the agreement between FLVS and the Contractor as defined by FLVS Standard Master Service Contract Form and its incorporated documents.
- (iii) **"FLVS Standard Master Service Contract Form"** means the document that contains basic information about the Contract and incorporates by reference the applicable Contract Terms and Conditions, the RFX, Contractor's Response to the RFX, the final pricing documentation for Services and any mutually agreed clarifications, modifications, additions and deletions resulting from final contract negotiations. No objection or amendment by a Contractor to the RFX requirements or the Contract shall be incorporated by reference into this Contract unless FLVS has accepted the Contractor's objection or amendment in writing. FLVS Standard Contract Form is defined separately and referred to separately throughout FLVS Standard Master Service Contract as a means of identifying the location of certain information. For example, the initial term of the Contract is defined by the dates in FLVS Standard Master Service Contract Form.
- (iv) **"Contractor"** means the provider(s) of the Services under the Contract.
- (v) **"Purchase Order"** means the form or format used to make a purchase under the Contract (e.g., a formal written purchase order, electronic purchase order, procurement card, or other authorized means).
- (vi) **"Response"** means the Contractor's submitted response to the RFX, including any modifications or clarifications accepted by FLVS.
- (vii) **"RFX"** means the Request for Proposal, Request for Bid, Invitation to Negotiate or other solicitation document (and any amendments or addenda thereto) specifically identified in FLVS Standard Master Service Contract Form that was issued to solicit the Services that are subject to the Contract.
- (viii) **"Services"** means the services and deliverables as provided in the SOW and as further described by the Response and the Contract.
- (ix) **"State"** means the State of Florida, FLVS, and any other authorized state entities issuing Purchase Orders against the Contract.
- (x) **"Statement of Work (SOW)"** means the Contractor's Responsibilities as described in detail in Attachment 5.

- 1.2 Priority of Contract Provisions.** Any pre-printed contract terms and conditions included on Contractor's forms or invoices shall be null and void.
- 1.3 Reporting Requirements.** Contractor shall provide all reports required by the SOW. In addition, unless otherwise provided in the SOW, Contractor shall keep a record of the purchases made pursuant to the Contract and shall submit a quarterly written report to FLVS.
- 1.4 Construction of Contract:** FLVS and the contractor waive application of the principle of contract construction that ambiguities are to be construed against a contract's drafter, and agree that this Agreement is their joint product. FLVS and the Contractor agree that they have had their respective attorneys review and approve this Agreement or that they have had the opportunity to do so. Time is of the essence with regard to each and every obligation of the Contractor contained in the Agreement. Each such obligation is deemed material, and a breach of any such obligation (including a breach resulting from the untimely performance thereof) shall constitute a material breach.

## **2. DURATION OF CONTRACT**

- 2.1 Contract Term.** The Contract between FLVS and the Contractor shall begin and end on the dates specified in FLVS Standard Master Service Contract Form unless terminated earlier in accordance with the applicable terms and conditions. This Contract shall not be deemed to create a debt of FLVS for the payment of any sum beyond the fiscal year of execution or, in the event of a renewal, beyond the fiscal year of such renewal.

The initial term of the contract shall be for a <<INSERT NUMBER OF YEARS (SPELLED OUT)>> <<(INSERT NUMBER ONLY)>> year period following execution of Standard Master Service Contract. The initial term of the contract shall be from <<INSERT BEGINNING DATE>> through <<INSERT END DATE>> and the anticipated award date is <<INSERT BOARD APPROVAL DATE>>.

- 2.2 Contract Renewal.** FLVS shall have the option, in its sole discretion, to renew the Contract for additional terms as defined in FLVS Standard Master Service Contract Form on a year-to-year basis by giving the Contractor written notice of the renewal decision at least sixty (60) days prior to the expiration of the initial term or renewal term. Renewal will depend upon the best interests of the FLVS, funding, and Contractor's performance. Renewal will be accomplished through the issuance of a Notice of Renewal Amendment. Upon FLVS election, in its sole discretion, to renew any part of this Contract, Contractor shall remain obligated to perform in strict accordance with this Contract unless otherwise agreed by FLVS and the Contractor.

This contract may be renewed for <<INSERT NUMBER OF YEARS (SPELLED OUT)>> <<(INSERT NUMBER ONLY)>> year periods provided all terms and conditions remain unchanged and in full force and effect. This option to renew requires the mutual agreement of both parties. Refusal by either party to exercise this option to renew will require this contract to expire on the original or mutually agreed date.

- 2.3 Contract Extension.** In the event that this Contract shall terminate or be likely to terminate prior to the making of an award for a new contract for the Services, FLVS may, with the written consent of Contractor, extend this Contract for such period as may be necessary to afford the FLVS a continuous supply of the Services.

## **3. DESCRIPTION OF SERVICES**

- 3.1 Statement of Work (SOW):** All Services shall be provided in accordance with the specifications contained in the attached Statement of Work, the terms of the Contract, and as further described in Contractor's Response.
- 3.2 Non-Exclusive Rights.** The Contract is not exclusive. FLVS reserves the right to select other contractors to provide services similar to the Services described in the Contract during the term of the Contract.
- 3.3 No Minimums Guaranteed.** The Contract does not guarantee any minimum level of purchases or use of Services.



## 4. COMPENSATION

**4.1 Pricing and Payment.** The Contractor will be paid for Services provided pursuant to the Contract and final pricing documents as incorporated into FLVS Standard Master Service Contract Form and the terms of the Contract. Unless clearly stated otherwise in the Contract, all prices are firm and fixed and are not subject to variation. Prices include, but are not limited to freight, insurance, fuel surcharges and customs duties. FLVS shall pay the amount set out in Attachment 3 or in the applicable Statements of Work for any goods and/or services purchased hereunder. Payments made to the Contractor may be by a Visa Purchasing Card.

**4.2 Purchase Orders.** FLVS shall order services by issuing a purchase order. Purchase orders, used in conjunction with a Statement of Work (SOW), shall reference the SOW to establish the specific deliverables, costs, payment schedules, start/completion dates, etc. for specific assignments.

The award of the response shall not constitute an order. Before any shipments are made or services rendered, Proposer must receive a purchase order. Services shall be made as specified on the purchase order or reference the corresponding Contractual agreement governing the specifications and terms and conditions. Contractor will not be compensated for work performed without receipt of a purchase order.

**4.3 Billing/Invoice.** The Contractor shall submit an invoice for the Services supplied to FLVS under the Contract at the billing address specified in the Purchase Order or Contract. Invoices must include the FLVS purchase order number. Any invoice submitted as a result of the award of this Bid shall be itemized reflecting the items on the purchase order. "Lump sum" invoices shall not be submitted nor will be accepted for multiple line purchase orders. FLVS will only pay the dollar amounts authorized on the purchase order. The invoice shall comply with all applicable rules concerning payment of such claims. FLVS shall pay all approved invoices in arrears and in accordance with applicable provisions of State law.

Invoices should be submitted within fifteen (15) days of completion of work. Detailed invoices are to be sent to the attention Project Manager for approval for hours worked on the listed projects. FLVS will only reimburse Contractor for expenses incurred in performing services authorized in advance by FLVS project manager. FLVS shall pay to Provider the fees for services within forty-five (45) days of receipt of invoice.

Unless otherwise agreed in writing by FLVS and the Contractor, the Contractor shall not be entitled to receive any other payment or compensation from FLVS for Services provided by or on behalf of the Contractor under the Contract. The Contractor shall be solely responsible for paying all costs, expenses and charges it incurs in connection with its performance under the Contract.

**4.4 Delay of Payment Due to Contractor's Failure.** If FLVS in good faith determines that the Contractor has failed to perform or deliver Services as required by the Contract, the Contractor shall not be entitled to any compensation under the Contract until such Service is performed or delivered. In this event, FLVS may withhold that portion of the Contractor's compensation which represents payment for Services that were not performed or delivered. To the extent that the Contractor's failure to perform or deliver in a timely manner causes FLVS to incur costs, FLVS may deduct the amount of such incurred costs from any amounts payable to Contractor. FLVS authority to deduct such incurred costs shall not in any way affect FLVS authority to terminate the Contract.

**4.5 Set-Off Against Sums Owed by the Contractor.** In the event that the Contractor owes FLVS any sum under the terms of the Contract, pursuant to any judgment, or pursuant to any law, FLVS may set off the sum owed against any sum owed by FLVS to the Contractor in FLVS sole discretion.

## 5. TERMINATION

- 5.1 Immediate Termination.** This Contract will terminate immediately and absolutely if FLVS determines that adequate funds are not appropriated or granted or funds are de-appropriated such that FLVS cannot fulfill its obligations under the Contract, which determination is at FLVS sole discretion and shall be conclusive. Further, FLVS may terminate the Contract for any one or more of the following reasons effective immediately without advance notice:
- 5.1.1** In the event the Contractor is required to be certified or licensed as a condition precedent to providing the Services, the revocation or loss of such license or certification may result in immediate termination of the Contract effective as of the date on which the license or certification is no longer in effect;
  - 5.1.2** FLVS determines that the actions, or failure to act, of the Contractor, its agents, employees or subcontractors have caused, or reasonably could cause, life, health or safety to be jeopardized;
  - 5.1.3** The Contractor fails to comply with confidentiality laws or provisions; and/or
  - 5.1.4** The Contractor furnished any statement, representation or certification in connection with the Contract or the bidding process which is materially false, deceptive, incorrect or incomplete.
- 5.2 Termination for Cause.** The occurrence of any one or more of the following events shall constitute cause for FLVS to declare the Contractor in default of its obligations under the Contract:
- 5.2.1** The Contractor fails to deliver or has delivered nonconforming Services or fails to perform, to FLVS satisfaction, any material requirement of the Contract or is in violation of a material provision of the Contract, including, but without limitation, the express warranties made by the Contractor;
  - 5.2.2** FLVS determines that satisfactory performance of the Contract is substantially endangered or that a default is likely to occur;
  - 5.2.3** The Contractor fails to make substantial and timely progress toward performance of the Contract;
  - 5.2.4** The Contractor becomes subject to any bankruptcy or insolvency proceeding under federal or state law to the extent allowed by applicable federal or state law including bankruptcy laws; the Contractor terminates or suspends its business; or FLVS reasonably believes that the Contractor has become insolvent or unable to pay its obligations as they accrue consistent with applicable federal or state law;
  - 5.2.5** The Contractor has failed to comply with applicable federal, state and local laws, rules, ordinances, regulations and orders when performing within the scope of the Contract;
  - 5.2.6** The Contractor has engaged in conduct that has or may expose FLVS to liability, as determined in FLVS sole discretion; or
  - 5.2.7** The Contractor has infringed any patent, trademark, copyright, trade dress or any other intellectual property rights of FLVS.
  - 5.2.8** The Contractor is found guilty of a public crime.
- 5.3 Notice of Default.** If there is a default event caused by the Contractor, FLVS shall provide written notice to the Contractor requesting that the breach or noncompliance be remedied within the period of time specified in FLVS written notice to the Contractor. If the breach or noncompliance is not remedied within the period of time specified in the written notice, FLVS may:
- 5.3.1** Immediately terminate the Contract without additional written notice; and/or
  - 5.3.2** Procure substitute services from another source and charge the difference between the Contract and the substitute contract to the defaulting Contractor; and/or,
  - 5.3.3** Enforce the terms and conditions of the Contract and seek any legal or equitable remedies.

- 5.4 Termination Upon Notice.** Following thirty (30) days' written notice, FLVS may terminate the Contract in whole or in part without the payment of any penalty or incurring any further obligation to the Contractor. Following termination upon notice, the Contractor shall be entitled to compensation, upon submission of invoices and proper proof of claim, for Services provided under the Contract to FLVS up to and including the date of termination.
- 5.5 Termination Due to Change in Law.** FLVS shall have the right to terminate this Contract without penalty by giving thirty (30) days' written notice to the Contractor as a result of any of the following:
- 5.5.1** FLVS authorization to operate is withdrawn or there is a material alteration in the programs administered by FLVS; and/or
  - 5.5.2** FLVS duties are substantially modified.
- 5.6 Payment Limitation in Event of Termination.** In the event of termination of the Contract for any reason by FLVS, FLVS shall pay only those amounts, if any, due and owing to the Contractor for the Services actually rendered up to the date specified in the notice of termination for which FLVS is obligated to pay pursuant to the Contract or Purchase Order. Payment will be made only upon submission of invoices and proper proof of the Contractor's claim. This provision in no way limits the remedies available to FLVS under the Contract in the event of termination. The FLVS shall not be liable for any costs incurred by the Contractor in its performance of the Contract, including, but not limited to, startup costs, overhead or other costs associated with the performance of the Contract.
- 5.7 The Contractor's Termination Duties.** Upon receipt of notice of termination or upon request of FLVS, the Contractor shall:
- 5.7.1** Cease work under the Contract and take all necessary or appropriate steps to limit disbursements and minimize costs, and furnish a report within thirty (30) days of the date of notice of termination, describing the status of all work under the Contract, including, without limitation, results accomplished, conclusions resulting therefrom, and any other matters FLVS may require;
  - 5.7.2** Immediately cease using and return to FLVS, any personal property or materials, whether tangible or intangible, provided by FLVS to the Contractor;
  - 5.7.3** Comply with FLVS instructions for the timely transfer of any active files and work product produced by the Contractor under the Contract;
  - 5.7.4** Cooperate in good faith with FLVS and its employees, agents and contractors during the transition period between the notification of termination and the substitution of any replacement contractor(s); and
  - 5.7.5** Immediately return to FLVS any payments made by FLVS for Services that were not delivered or rendered by the Contractor.

## **6. CONFIDENTIAL INFORMATION**

- 6.1 Access to Confidential Data.** The Contractor's employees, agents and subcontractors may have access to confidential data maintained by FLVS to the extent necessary to carry out the Contractor's responsibilities under the Contract. The Contractor shall presume that all information received pursuant to the Contract is confidential unless otherwise designated by FLVS. If it is reasonably likely the Contractor will have access to FLVS's confidential information, then:
- 6.1.1** The Contractor shall provide to FLVS a written description of the Contractor's policies and procedures to safeguard confidential information;
  - 6.1.2** Policies of confidentiality shall address, as appropriate, information conveyed in verbal, written, and electronic formats;
  - 6.1.3** The Contractor must designate one individual who shall remain the responsible authority in charge of all data collected, used, or disseminated by the Contractor in connection with the performance of the Contract; and

- 6.1.4** The Contractor shall provide adequate supervision and training to its agents, employees and subcontractors to ensure compliance with the terms of the Contract.

The private or confidential data shall remain the property of FLVS at all times. Some Services performed for FLVS may require the Contractor to sign a nondisclosure agreement. Contractor understands and agrees that refusal or failure to sign such a nondisclosure agreement, if required, may result in termination of the Contract.

- 6.2 No Dissemination of Confidential Data.** No confidential data collected, maintained, or used in the course of performance of the Contract shall be disseminated except as authorized by law and with the written consent of FLVS, either during the period of the Contract or thereafter. Any data supplied to or created by the Contractor shall be considered the property of FLVS. The Contractor must return any and all data collected, maintained, created or used in the course of the performance of the Contract, in whatever form it is maintained, promptly at the request of FLVS.
- 6.3 Subpoena.** In the event that a subpoena or other legal process is served upon the Contractor for records containing confidential information, the Contractor shall promptly notify FLVS and cooperate with FLVS in any lawful effort to protect the confidential information.
- 6.4 Reporting of Unauthorized Disclosure.** The Contractor shall immediately report to FLVS any unauthorized disclosure of confidential information.
- 6.5 Survives Termination.** The Contractor's confidentiality obligation under the Contract shall survive termination of the Contract.

## **7. INDEMNIFICATION**

- 7.1 Contractor's Indemnification Obligation.** The Contractor agrees to indemnify and hold harmless FLVS, its Board of Directors, and all State of Florida officers, employees, agents, and volunteers who are engaged in any activities relating to the Contract (collectively, "Indemnified Parties") from any and all costs, expenses, losses, claims, damages, liabilities, settlements and judgments, including reasonable value of the time spent by the Attorney General's Office, related to or arising from:
- 7.1.1** Any breach of the Contract;
  - 7.1.2** Any negligent, intentional or wrongful act or omission of the Contractor or any employee, agent or subcontractor utilized or employed by the Contractor;
  - 7.1.3** Any failure of Services to comply with applicable specifications, warranties, and certifications under the Contract;
  - 7.1.4** The negligence or fault of the Contractor in design, testing, development, manufacture, or otherwise with respect to the Services provided under the Contract;
  - 7.1.5** Claims, demands, or lawsuits that, with respect to the goods (if any) or any parts thereof, allege product liability, strict product liability, or any variation thereof;
  - 7.1.6** The Contractor's performance or attempted performance of the Contract, including any employee, agent or subcontractor utilized or employed by the Contractor;
  - 7.1.7** Any failure by the Contractor to comply with the "Compliance with the Law" provision of the Contract;
  - 7.1.8** Any failure by the Contractor to make all reports, payments and withholdings required by federal and state law with respect to social security, employee income and other taxes, fees or costs required by the Contractor to conduct business in the State of Florida or the United States;

**7.1.9** Any infringement of any copyright, trademark, patent, trade dress, or other intellectual property right; or

**7.1.10** Any failure by the Contractor to adhere to the confidentiality provisions of the Contract.

**7.2 Duty to Reimburse State Tort Claims Fund.** To the extent such damage or loss as covered by this indemnification is also covered by the State of Florida Tort Claims Fund ("the Fund"), the Contractor (and its insurers) agrees to reimburse the Fund. To the full extent permitted by the Constitution and the laws of the State and the terms of the Fund, the Contractor and its insurers waive any right of subrogation against the FLVS, the Indemnified Parties, and the Fund and insurers participating thereunder, to the full extent of this indemnification.

**7.3 Litigation and Settlements.** . No settlement or compromise of any claim, loss or damage entered into by the Indemnified Parties shall be binding upon Contractor unless approved in writing by Contractor. No settlement or compromise of any claim, loss or damage entered into by Contractor shall be binding upon the Indemnified Parties unless approved in writing by the Indemnified Parties. Both parties recognize that the Florida Legislature has waived sovereign immunity for liability relating to certain torts, but only to the extent specified in § 768.28 of the Florida Statutes.

#### **7.4 CLAIMS AND DISPUTES**

**7.4.1** The term "Claim" as used herein shall mean any and all demands made by one party hereunder against the other party, whether such demand be for money, time or the assertion of any right or obligation that arises out of the Contract Documents.

**7.4.2** Initial notice of Claims by Contractor shall be made in writing to FLVS within seven (7) calendar days after the first day of the event giving rise to such Claim or else Contractor shall be deemed to have waived the Claim. Written supporting data shall be submitted to FLVS within thirty (30) calendar days after the occurrence of the event, unless FLVS grants additional time in writing, or else Contractor shall be deemed to have waived the Claim.

**7.4.3** Contractor shall proceed diligently with its performance as directed by FLVS, regardless of any pending Claim, unless otherwise agreed to by FLVS in writing. FLVS shall continue to make payments in accordance with the Contract Documents during the pendency of any Claim.

**7.5 Intellectual Property Indemnification.** Contractor shall, at its own expense, indemnify, defend and hold harmless the Indemnified Parties, from and against any third-party liabilities, claims, demands or suits alleging that the Indemnifying Party's goods or services infringes any patent, trademark, copyright or other Intellectual Property right of a third party and shall pay all damages awarded or agreed to under a settlement for the Indemnified Parties;

In case any of the Services is in any suit held to constitute infringement and its use is enjoined, Contractor shall, at its option and expense:

**7.5.1** Procure for FLVS the right to continue using the Services;

**7.5.2** Replace or modify the same to the reasonable satisfaction of FLVS so that it becomes non-infringing; or

**7.5.3** Remove the same and cancel any future charges pertaining thereto.

Contractor, however, shall have no liability to FLVS if any such patent, copyright, or trademark infringement or claim thereof is based upon or arises out of:

**7.5.4** Compliance with designs, plans or specifications furnished by or on behalf of FLVS as to the Services;

**7.5.5** Use of the Services in combination with apparatus or devices not supplied by Contractor, but only if combination is the cause of the infringement; or

**7.5.6** Use of the Services in a manner for which the same was neither designed nor contemplated.

**7.6 Procedure for Indemnification.** For all claims subject to indemnification obligations, FLVS will: (i) provide prompt notice to Contractor of the claim (but delayed notification shall not constitute a basis for avoiding indemnification unless the delay materially prejudices Contractor's ability to defend the claim); (ii) subject to approval of the Attorney General of the State of Florida, provide Contractor with control over the defense and/or settlement of such claim (with the Indemnified Parties retaining the right to be represented by their own counsel at their own expense if they so elect), and (iii) provide reasonable cooperation and assistance, with regard to such claim. Contractor may not resolve any claims against FLVS in a manner that imposes any liability other obligations on the Indemnified Parties without FLVS' prior written consent.

**7.7 Survives Termination.** The indemnification obligation of Contractor shall survive termination of the Contract.

## **8. INSURANCE**

**8.1** Contractor shall provide all insurance as required.

**8.1.1** Contractor shall obtain and maintain in full force prior to performance and effect throughout the initial Term and any Renewal Term no less than 5 years past the completion of the project with a reputable insurance carrier qualified to do business in the state or states in which the Premises are located and having a rating of not less than "A" from A.M. Best & Company. All certificates of insurance shall be provided within ten calendar days of contract execution.

**8.1.2** All policies of insurance shall be written on a per occurrence basis. All such insurance policies shall, to the extent permitted under applicable law, provide that (a) the policies shall not be cancelled nor shall any material change be made therein without at least ten (10) days prior written notice to Florida Virtual School (FLVS) and (b) FLVS is to be named as an additional insured party with respect to Respondent activities.

**8.1.3** General Liability Insurance of not less than One Million (1,000,000) per occurrence and Two Million (2,000,000) General Aggregate for bodily injury and property damage liability, and personal injury and advertising liability. The General Liability policy should be on CGL 0001 (12/04) or equivalent form. Insurance shall be primary and non-contributory to any other insurance of the certificate holder and shall name the certificate holder, owners and any other required by written contract or an agreement as additional insured.

- a) Policy should be endorsed with a "per project aggregate". All coverage's should include contingent liability and contingent property damage liability. If coverage is written on a Claims made basis the retroactive and continuity dates should be at least the first day services begin with FLVS. Policy should include an endorsement waiving all rights to subrogate against FLVS.
- b) The above policies for General Liability insurance must be so written as to include Contingent Liability and Contingent Property Damage Insurance to protect the contract against claims arising from the operation of subcontractors.

- 8.1.4** Worker's Compensation Insurance: The Contractor shall maintain during the life of this Contract, Worker's Compensation Insurance in accordance with Florida Statute 440. Contractors shall require all subcontractors to maintain such insurance during the life of this Contract Employer's Liability Insurance: The Contractor shall maintain, Employer's Liability Insurance shall be in the amounts not less than Five Hundred Thousand Dollars \$500,000.00 each accident for bodily injury by accident, Five Hundred Thousand Dollars \$500,000.00 each employee for bodily injury by disease, and Five Hundred Thousand Dollars \$500,000.00 policy limit for bodily injury by disease.
- 8.1.5** Automobile Liability Insurance: Automobile Liability Insurance shall be maintained, by Contractors to ownership, maintenance, and use, including loading and unloading, of all owned, non-owned, leased or hired vehicles with limits of not less than One Million Dollars \$1,000,000 combined single limit each accident for bodily injury & property damage liability.
- 8.1.6** Professional Liability and Cyber Liability including: Technology Errors and Omissions, Telecommunications Errors and Omissions, or Multimedia Professional Liability whichever is applicable not less than One Million \$1,000,000, and Network Security Liability, Privacy Liability, Crisis Management, Cyber Extortion, and Media Liability not less than One Million Dollars \$1,000,000

## 9. BONDS

- 9.1** The Contractor shall provide all required bonds as stated by FLVS herein. The bonds shall be issued by a company licensed to do business in the state of Florida, with offices in Florida and with a four star rating or higher
- |              |                   |                                   |   |
|--------------|-------------------|-----------------------------------|---|
| <b>9.1.1</b> | Bid Bond:         | Required <input type="checkbox"/> | Not Applicable <input type="checkbox"/> |
| <b>9.1.2</b> | Contract Bond:    | Required <input type="checkbox"/> | Not Applicable <input type="checkbox"/> |
| <b>9.1.3</b> | Maintenance Bond: | Required <input type="checkbox"/> | Not Applicable <input type="checkbox"/> |
| <b>9.1.4</b> | Performance Bond: | Required <input type="checkbox"/> | Not Applicable <input type="checkbox"/> |
| <b>9.1.5</b> | Payment Bond:     | Required <input type="checkbox"/> | Not Applicable <input type="checkbox"/> |

## 10. WARRANTIES

- 10.1** Construction of Warranties Expressed in the Contract with Warranties Implied by Law: All warranties made by the Contractor and/or subcontractors in all provisions of the Contract and the Contractor's Response, whether or not the Contract specifically denominates the Contractor's and/or subcontractors' promise as a warranty or whether the warranty is created only by the Contractor's affirmation or promise, or is created by a description of the Services to be provided, or by provision of samples to FLVS shall not be construed as limiting or negating any warranty provided by law, including without limitation, warranties which arise through course of dealing or usage of trade, the warranty of merchantability, and the warranty of fitness for a particular purpose. The warranties expressed in the Contract are intended to modify the warranties implied by law only to the extent that they expand the warranties applicable to the Services provided by the Contractor. The provisions of this section apply during the term of the Contract and any extensions or renewals thereof.
- 10.2** Warranty – Nonconforming Services and Goods. All Services and any goods delivered by Contractor to FLVS shall be free from any defects in design, material, or workmanship. If any Services or goods offered by the Contractor are found to be defective in material or workmanship, or do not conform to Contractor's warranty, FLVS shall have the option of returning, repairing, or replacing the defective Services or goods at Contractor's expense. Payment for Services and any goods shall not constitute

acceptance. Acceptance by FLVS shall not relieve the Contractor of its warranty or any other obligation under the Contract.

- 10.3 Compliance with Federal Safety Acts.** Contractor warrants and guarantees to FLVS that the Services provided under the Contract are in compliance with Sections 5 and 12 of the Federal Trade Commission Act; the Fair Packaging and Labeling Act; the Federal Food, Drug, and Cosmetic Act; the Consumer Product Safety Act; the Federal Environmental Pesticide Control Act; the Federal Hazardous Substances Act; the Fair Labor Standards Act; the Wool Products Labeling Act; the Flammable Fabrics Act; the Occupational Safety and Health Act; the Office of Management and Budget A-110 Appendix A; and the Anti-Kickback Act of 1986.
- 10.4 Conformity with Contractual Requirements.** The Contractor represents and warrants that the Services provided in accordance with the Contract will appear and operate in conformance with the terms and conditions of the Contract.
- 10.5 Authority to Enter into Contract.** The Contractor represents and warrants that it has full authority to enter into the Contract and that it has not granted and will not grant any right or interest to any person or entity that might derogate, encumber or interfere with the rights granted to FLVS.
- 10.6 Obligations Owed to Third Parties.** The Contractor represents and warrants that all obligations owed to third parties with respect to the activities contemplated to be undertaken by the Contractor pursuant to the Contract are or will be fully satisfied by the Contractor so that FLVS will not have any obligations with respect thereto.
- 10.7 Confidentiality of FLVS Data.** With respect to all confidential data or other materials provided to Contractor in conjunction with this Agreement, including but not limited to financial, statistical, technical, personnel data, and student data, Contractor shall keep and instruct its personnel to keep such information confidential by using the same care and discretion Contractor uses with its own most highly confidential information, but in no even less than a reasonable standard of care. This Agreement shall not affect the rights of either party to use or disclose information (a) which such party can demonstrate to have been in the public domain through no wrongful act of such party prior to the date of its disclosure to such party by the other party; (b) which such party can demonstrate by written records predating disclosure to the other party by such party to have been in the possession of such party on a non-confidential basis prior to the date of its disclosure; (c) which becomes part of the public domain by publication or otherwise not due to any unauthorized act or omission on the part of such party; (d) which such party can show by written records to have been disclosed to the other party on a non-confidential basis by a third party having a lawful right to do so; or (e) which is required to be disclosed by law, or governmental, judicial or legal process, provided, in each case that to the extent not contrary to law or any provision of any regulatory authority, such party timely informs the other party and, at the expense of the other party, cooperates with the other party to limit such disclosure. Contractor further agrees neither it nor its' employees will use student information for any reason including but not limited to bulk commercial mailings (spam), selling email addresses, or revealing the names and email addresses of primary or end users. Contractor ensures that employees with access to student data will abide by this policy.
- 10.8 Assignment.** For valuable consideration, the receipt and sufficiency of which is hereby acknowledged, Contractor agrees to and hereby does assign to FLVS all intellectual property rights in all written materials, video, graphics or other multimedia materials, computer programs (including all source and object code, documentation, manuals or specifications relating to same) and any other works or materials created for FLVS under this Agreement or any Statement of Work as such rights are defined in any jurisdiction throughout the world (the "Work Product"). Contractor agrees to execute all documents that may be necessary to confirm FLVS' ownership of the Work Product, acknowledges that FLVS may use the Work Product in whatever way and for whatever purpose it chooses, in its sole



discretion, and represents and warrants that any third parties who are permitted to contribute to the Work Product under this Agreement are bound by all of the obligations of this paragraph.

- 10.9** License To Preexisting And Third-Party Materials. Unless otherwise approved by FLVS in advance, no third-party materials or preexisting Contractor materials will be incorporated into or combined with any Work Product delivered to FLVS. For any third-party materials or preexisting Contractor materials that are approved for use with Work Product, Contractor grants FLVS (on its own behalf and on behalf of any required third parties) a perpetual, non-exclusive, royalty free license to possess and use same for all purposes contemplated in this Agreement, including the right to create derivative works based on same.
- 10.10** Contractor's Representations and Warranties. Contractor represents and warrants that: (a) all Work Product created hereunder will be wholly original to Contractor and that Contractor has full right, title and authority to transfer ownership of same to FLVS as contemplated hereunder; (b) for any materials or other assets provided under this Agreement for which Contractor does not have full right, title or ownership, that Contractor has all necessary right and authority to grant the licenses or other rights set forth in this Agreement; (c) that there are no third-party restrictions on Contractor's rights, including but not limited to any confidentiality restrictions, license restrictions, encumbrances, liens or use restrictions, that will prevent FLVS from exercising the rights granted under this Agreement; (d) any Work Product will be compatible with and may be used in conjunction with other software or hardware as described herein, in any Statement of Work, or in any documentation relating to the Work Product; (e) there are no copy protection or similar mechanisms within the Work Product or any materials being licensed with it which will, either now or in the future, interfere with the rights granted herein; (f) the Work Product and any other materials licensed hereunder do not contain any virus, worm, Trojan Horse, tracking software or devices capable of identifying users or tracking use, or any undocumented software locks or drop dead devices which would render inaccessible or impair in any way the operation of the Work Product or any other hardware, software or data which the Work Product is designed to work with; (g) unless approved by FLVS in advance, the Work Product and any materials licensed with it are and shall be free from all liens and encumbrances, shall not contain any "open source" software, freeware or software subject to any public license or similar license obligations; (h) the Work Product, any materials licensed with it and FLVS exercise of its rights hereunder, do not and will not infringe upon, violate or misappropriate any patent, copyright, trade secret, trademark, contract, right of publicity or privacy, or other right or interest of any third party, will not constitute libel or slander against, any person, firm or corporation, and no such third party claims are pending or have been asserted or threatened as of the Effective Date; and (i) any maintenance, support or other services performed hereunder shall be performed in a professional and competent manner in accordance with industry standards and in compliance with all applicable laws, regulations and orders.
- 10.11** Hosting Or Storing FLVS Data. **[THIS PROVISION APPLIES ONLY IF CONTRACTOR IS HOSTING OR STORING DATA FOR FLVS]** If this Agreement contemplates Contractor hosting or otherwise storing FLVS' data on FLVS' behalf, Contractor agrees to maintain the appropriate security safeguards reasonably necessary to prevent unauthorized persons from accessing, using, disclosing, or otherwise committing any act that could breach or compromise the privacy, availability, integrity, or content of such data or information. Contractor and/or its designated hosting provider shall transmit and store any and all Confidential Information using a commercially supported encryption solution. Stored information means Confidential Information resting on any end user device, including but not limited to laptop and desktop computers, smartphones, tablets and PDA computers, CD/DVD media, removable flash drives, and backup tapes. Licensor shall transmit all Confidential Information in encrypted form. Licensor shall employ encryption solutions that meet the recommendations of the National Institute of Standards and

Technology (NIST) Special Publication 800-111 and Federal Information Processing Standard (FIPS) 140-2.

In the event Contractor or its representatives becomes aware of any unauthorized access to, use or disclosure of, or potential access to or use or disclosure of any of FLVS' data being stored for FLVS (a "Data Breach"), Contractor shall promptly, and at its own expense, (i) notify FLVS of the Data Breach; (ii) cooperate with FLVS in the investigation, analysis, notification and mitigation activities; and (iii) indemnify FLVS for all costs FLVS incurs for those activities.

Contractor shall provide a monthly incremental update of FLVS data in an industry standard format to a repository mutually agreed upon with FLVS.

In the event Contractor's hosting or other storage of FLVS' data is terminated, Contractor must ensure that FLVS is able to output all data, and save all reports, documents, and images in appropriate file folders prior to such termination and will provide, at no additional cost, reasonable assistance to FLVS to recover its data. To facilitate FLVS' recovery of its data, Contractor must provide a Data Dictionary for all data stores that hold or manage FLVS data. "Data Dictionary" means a document that describes the details of all databases and database management systems (DBMS) including the schema used to structure the data, the types of records stored in the database, integrity constraints, whether or not the records are encrypted, relationships and dependencies of the data to other systems, as well as the locations, hostnames, IP addresses of the database and DBMSs; additionally, the document must include the name and locations of all log files, transaction logs, key storage, and all other pertinent details that help identify, locate and access the database system and all of its components. FLVS may use the information related to such Data Dictionary for creating software interfaces to the applicable databases. The Contractor data systems must provide FLVS with all reasonably required connectivity information to ensure that FLVS may connect any third party or FLVS owned functional components to the Contractor data systems as deemed necessary by FLVS, in its discretion, to obtain its data in useable form and in a manner that will minimize the disruption to FLVS' operations.

- 10.12 Industry Standards. The Contractor represents and expressly warrants that all aspects of the Services provided or used by it shall at a minimum conform to the standards in the Contractor's industry. This requirement shall be in addition to any express warranties, representations, and specifications included in the Contract, which shall take precedence.
- 10.13 Contractor's Personnel and Staffing. Contractor warrants that all persons assigned to perform Services under this Contract are either lawful employees of Contractor or lawful employees of a subcontractor authorized by FLVS as specified in the RFX. All persons assigned to perform Services under this Contract shall be qualified to perform such Services. Personnel assigned by Contractor shall have all professional licenses required to perform the Services.
- 10.14 Security. FLVS requires that a criminal background investigation be made of any and all Contractor personnel utilized to provide Services to FLVS. Contractor represents and warrants that Contractor shall refrain from assigning personnel to any task under this Contract if such investigation reveals a disregard for the law or other background that indicates an unacceptable security risk as determined by FLVS. The Contractor's employees, agents and subcontractors may be granted access to state computers, hardware, software, programs and/or information technology infrastructure or operations to the extent necessary to carry out the Contractor's responsibilities under the Contract. Such access may be terminated at the sole discretion of FLVS. The Contractor shall provide immediate notice to FLVS of any employees, agents and/or subcontractors suspected of abusing or misusing such access privilege. The Contractor represents and warrants that Contractor shall provide notice to FLVS of the changed status of any employee, agent or subcontractor granted access to state computers, hardware, software,

programs and/or information technology infrastructure or operations, including, but not limited to, termination or change of the position or contract relationship.

- 10.15 **Jessica Lunsford Act:** Effective September 1, 2005, in order to be in compliance with the Jessica Lunsford Act, Awardees meeting any of the three criteria listed below will be required to be Level II fingerprinted and screened by our Human Resources Department. This consists of a FDLE/FBI criminal record and fingerprint search. Contractor shall assign no person to perform work hereunder who has any form of criminal record without the prior written authorization of FLVS.

The Technical Assistance paper for the Jessica Lunsford Act can be accessed at <http://info.fldoe.org/docushare/dsweb/Get/Document-3151/k12%2005-107a>.

- 10.16 **Public Entity Crimes.** A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

The Contractor certifies by submission of this RFP, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.

## **11. PRODUCT RECALL**

If this Contract includes the provision of goods and in the event that any of the goods are found by the Contractor, FLVS, any governmental Agency, or court having jurisdiction to contain a defect, serious quality or performance deficiency, or not to be in compliance with any standard or requirement so as to require or make advisable that such goods be reworked or recalled, the Contractor will promptly communicate all relevant facts to FLVS and undertake all corrective actions, including those required to meet all obligations imposed by laws, regulations, or orders, and shall file all necessary papers, corrective action programs, and other related documents, provided that nothing contained in this section shall preclude FLVS from taking such action as may be required of it under any such law or regulation. The Contractor shall perform all necessary repairs or modifications at its sole expense except to any extent that the Contractor and FLVS shall agree to the performance of such repairs by FLVS upon mutually acceptable terms.

## **12. SOLICITATION OF EMPLOYEES**

Each Party (FLVS and Contractor) agrees that, during the Term of this Agreement and for a period of twelve months following the termination of this Agreement for any reason, such Party shall not, directly or indirectly, on its own behalf or as a representative of any other person or entity, solicit or induce any employee of the other Party to terminate his or her employment relationship or to enter into employment with any other person or entity. Notwithstanding the foregoing, a general solicitation for resumes or employees published in a newspaper, on the internet or in any other public medium or in a similar manner will not be deemed to be a violation of this Section 12. Contractor acknowledges that FLVS has informed Contractor that FLVS employees are under contract that contain non-compete Agreement and Contractor will not hire said employees unless the non-compete Agreement has expired.

## **13. CONTRACT ADMINISTRATION**

FLVS will periodically inspect work to assure that the requirements of this contract are being met. Should it be found that the requirements specified herein are not being satisfactorily maintained, the

Contractor shall be contacted and any discrepancies, inconsistencies, or items not meeting the specifications contained herein, are to be corrected immediately at no additional cost to FLVS. A second discrepancy notice shall serve as notification that any future discrepancies, inconsistencies, or items not meeting specifications contained herein, will result in termination of the Contractor right to proceed further with this work. In such event, the Contractor will be paid only for materials used. The Contractor and their sureties may be liable to FLVS for any additional cost incurred by FLVS to complete the job. At this point, the Contractor shall be considered in default and the contract subject to termination. Performance ratings may be considered during award of future contracts by FLVS.

Failure of the Contractor to comply with any of the provisions of this contract shall be considered a material breach of contract and shall be cause for immediate termination of the contract, at the discretion of FLVS.

FLVS reserves the right to terminate this contract, in whole or in part, should the need for the services cease to exist.

Contractor shall be subject to periodic performance evaluations by FLVS personnel. Continued unsatisfactory ratings shall be cause to find the Contractor in default of the contract.

Upon cancellation of any ensuing agreement, FLVS reserves the right to award the contract to the responsible Proposer(s) offering the next highest rated proposal to FLVS for the unexpired term of the canceled contract, or for a full year period, whichever is deemed to be in FLVS's best interest.

- 13.1 Compliance with the Law.** The Contractor, its employees, agents, and subcontractors shall comply with all applicable federal, state, and local laws, rules, ordinances, regulations and orders now or hereafter in effect when performing under the Contract, including without limitation, all laws applicable to the prevention of discrimination in employment and the use of targeted small businesses as subcontractors or contractors. The Contractor, its employees, agents and subcontractors shall also comply with all federal, state and local laws regarding business permits and licenses that may be required to carry out the work performed under the Contract. Contractor and Contractor's personnel shall also comply with all State and FLVS policies and standards in effect during the performance of the Contract, including but not limited to FLVS's policies and standards relating to personnel conduct, security, safety, confidentiality, and ethics.

- 13.2 Drug-free Workplace.** The Contractor hereby certifies as follows:

- 13.2.1** Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace, and specifying the actions that will be taken against employees for violations of such prohibition.
- 13.2.2** Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
- 13.2.3** Give each employee engaged in providing the commodities or contractual services that are under proposal a copy of the statement specified in subsection (1).
- 13.2.4** In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States, or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

- 13.2.5** Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- 13.2.6** Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.
- 13.3** Amendments. The Contract may be amended in writing from time to time by mutual consent of the parties. If the contract award exceeds the delegated purchasing authority of FLVS, then FLVS must obtain approval of the amendment from the Board. All amendments to the Contract must be in writing and fully executed by duly authorized representatives of FLVS and the Contractor.
- 13.4** Third Party Beneficiaries. There are no third-party beneficiaries to the Contract. The Contract is intended only to benefit FLVS, and the Contractor.
- 13.5** Choice of Law and Forum. The laws of the State of Florida shall govern and determine all matters arising out of or in connection with this Contract without regard to the choice of law provisions of State law. In the event any proceeding of a quasi-judicial or judicial nature is commenced in connection with this Contract, such proceeding shall solely be brought in a court or other forum of competent jurisdiction within Orange County, Florida. This provision shall not be construed as waiving any immunity to suit or liability, including without limitation sovereign immunity, which may be available to FLVS.
- 13.6** Attorney's Fees. If any action is commenced to construe or enforce any term, covenant, or condition of this Agreement, the prevailing party in such action shall be entitled to all costs and expenses of said action (including reasonable attorney's fees at the trial and appellate levels) from the unsuccessful party in said action.
- 13.7** Arbitration. In the event of any controversy or claim arising out of or relating to this Agreement, the parties specifically and irrevocably agree to submit such controversy or dispute to resolution by arbitration to be conducted in Orange County, Florida, in accordance with the arbitration rules of the American Arbitration Association. A judgment upon any award or decision rendered by the arbitrator shall be entered by a court having subject matter jurisdiction therein and all parties expressly waive any challenge to the use of arbitration in accordance with this paragraph. The parties hereto agree that jurisdiction ad venue for the entry of a judgment upon said arbitration award or decision shall be in Orange County, Florida. The arbitrators are directed to award the expenses of the arbitration, including required travel and other expenses of the arbitrators and any representatives of the arbitrators, the cost and charges of the American Arbitration Association and all reasonable attorney's fees and costs to the prevailing party in the arbitration.
- 13.8** Parties' Duty to Provide Notice of Intent to Litigate and Right to Demand Mediation. In addition to any dispute resolution procedures otherwise required under this Contract or any informal negotiations which may occur between FLVS and the Contractor, no civil action with respect to any dispute, claim or controversy arising out of or relating to this Contract may be commenced without first giving fourteen (14) calendar days written notice to FLVS of the claim and the intent to initiate a civil action. At any time prior to the commencement of a civil action, either FLVS or the Contractor may elect to submit the matter for mediation. Either FLVS or the Contractor may exercise the right to submit the matter for mediation by providing the other party with a written demand for mediation setting forth the subject of the dispute. The parties will cooperate with one another in selecting a mediator and in scheduling the mediation proceedings. Venue for the mediation will be in Orlando, Florida; provided, however, that any or all mediation proceedings may be conducted by teleconference with the consent of the mediator. The parties covenant that they will participate in the mediation in good faith.

All offers, promises, conduct and statements, whether oral or written, made in the course of the mediation by any of the parties, their agents, employees, experts and attorneys, and by the mediator or employees of any mediation service, are inadmissible for any purpose (including but not limited to impeachment) in any litigation or other proceeding involving the parties, provided that evidence that is

otherwise admissible or discoverable shall not be rendered inadmissible or non-discoverable as a result of its use in the mediation. Inadmissibility notwithstanding, all written documents shall nevertheless be subject to the Florida Public Records Act, Chapter 119, F.S.

No party may commence a civil action with respect to the matters submitted to mediation until after the completion of the initial mediation session, forty-five (45) calendar days after the date of filing the written request for mediation with the mediator or mediation service, or sixty (60) calendar days after the delivery of the written demand for mediation, whichever occurs first. Mediation may continue after the commencement of a civil action, if the parties so desire.

- 13.9 Assignment and Delegation.** The Contract may not be assigned, transferred or conveyed in whole or in part without the prior written consent of FLVS. For the purpose of construing this clause, a transfer of a controlling interest in the Contractor shall be considered an assignment.
- 13.10 Use of Third Parties.** Except as may be expressly agreed to in writing by FLVS, Contractor shall not subcontract, assign, delegate or otherwise permit anyone other than Contractor or Contractor's personnel to perform any of Contractor's obligations under this Contract or any of the work subsequently assigned under this Contract. No subcontract which Contractor enters into with respect to performance of obligations or work assigned under the Contract shall in any way relieve Contractor of any responsibility, obligation or liability under this Contract and for the acts and omissions of all subcontractors, agents, and employees. All restrictions, obligations and responsibilities of the Contractor under the Contract shall also apply to the subcontractors. Any contract with a subcontractor must also preserve the rights of FLVS. FLVS shall have the right to request the removal of a subcontractor from the Contract for good cause.
- 13.11 Integration.** The Contract represents the entire agreement between the parties. The parties shall not rely on any representation that may have been made which is not included in the Contract.
- 13.12 Headings or Captions.** The paragraph headings or captions used in the Contract are for identification purposes only and do not limit or construe the contents of the paragraphs.
- 13.13 Not a Joint Venture.** Nothing in the Contract shall be construed as creating or constituting the relationship of a partnership, joint venture, (or other association of any kind or agent and principal relationship) between the parties thereto. Each party shall be deemed to be an independent contractor contracting for the Services and acting toward the mutual benefits expected to be derived herefrom. Neither Contractor nor any of Contractor's agents, servants, employees, subcontractors or contractors shall become or be deemed to become agents, servants, or employees of FLVS. Contractor shall therefore be responsible for compliance with all laws, rules and regulations involving its employees and any subcontractors, including but not limited to employment of labor, hours of labor, health and safety, working conditions, workers' compensation insurance, and payment of wages. No party has the authority to enter into any contract or create an obligation or liability on behalf of, in the name of, or binding upon another party to the Contract.
- 13.14 Joint and Several Liability.** If the Contractor is a joint entity, consisting of more than one individual, partnership, corporation or other business organization, all such entities shall be jointly and severally liable for carrying out the activities and obligations of the Contract, and for any default of activities and obligations.
- 13.15 Supersedes Former Contracts or Agreements.** Unless otherwise specified in the Contract, this Contract supersedes all prior contracts or agreements between FLVS and the Contractor for the Services provided in connection with the Contract.
- 13.16 Waiver.** Except as specifically provided for in a waiver signed by duly authorized representatives of FLVS and the Contractor, failure by either party at any time to require performance by the other party or to claim a breach of any provision of the Contract shall not be construed as affecting any subsequent right to require performance or to claim a breach.

- 13.17 Notice.** Any and all notices, designations, consents, offers, acceptances or any other communication provided for herein shall be given in writing by registered or certified mail, return receipt requested, by receipted hand delivery, by Federal Express, courier or other similar and reliable carrier which shall be addressed to the person who signed the Contract on behalf of the party at the address identified in FLVS Standard Master Service Contract Form. Each such notice shall be deemed to have been provided:
- 13.17.1** At the time it is actually received; or,
- 13.17.2** Within one (1) day in the case of overnight hand delivery, courier or Services such as Federal Express with guaranteed next day delivery; or,
- 13.17.3** Within five (5) days after it is deposited in the U.S. Mail in the case of registered U.S. Mail.
- From time to time, the parties may change the name and address of the person designated to receive notice. Such change of the designated person shall be in writing to the other party and as provided herein.
- 13.18 Cumulative Rights.** The various rights, powers, options, elections and remedies of any party provided in the Contract shall be construed as cumulative and not one of them is exclusive of the others or exclusive of any rights, remedies or priorities allowed either party by law, and shall in no way affect or impair the right of any party to pursue any other equitable or legal remedy to which any party may be entitled as long as any default remains in any way un-remedied, unsatisfied or undischarged.
- 13.19 Severability.** If any provision of the Contract is determined by a court of competent jurisdiction to be invalid or unenforceable, such determination shall not affect the validity or enforceability of any other part or provision of the Contract. Further, if any provision of the Contract is determined to be unenforceable by virtue of its scope, but may be made enforceable by a limitation of the provision, the provision shall be deemed to be amended to the minimum extent necessary to render it enforceable under the applicable law. Any agreement of FLVS and the Contractor to amend, modify, eliminate, or otherwise change any part of this Contract shall not affect any other part of this Contract, and the remainder of this Contract shall continue to be of full force and effect.
- 13.20 Time is of the Essence.** Time is of the essence with respect to the performance of the terms of the Contract. Contractor shall ensure that all personnel providing Services to FLVS are responsive to FLVS's requirements and requests in all respects.
- 13.21 Authorization.** The persons signing this Contract represent and warrant to the other parties that:
- 13.21.1** It has the right, power and authority to enter into and perform its obligations under the Contract; and
- 13.21.2** It has taken all requisite action (corporate, statutory or otherwise) to approve execution, delivery and performance of the Contract and the Contract constitutes a legal, valid and binding obligation upon itself in accordance with its terms.
- 13.22 Successors in Interest.** All the terms, provisions, and conditions of the Contract shall be binding upon and inure to the benefit of the parties hereto and their respective successors, assigns and legal representatives.
- 13.23 Record Retention and Access.** The Contractor shall maintain books, records and documents in accordance with generally accepted accounting principles and procedures and which sufficiently and properly document and calculate all charges billed to FLVS throughout the term of the Contract for a period of at least five (5) years following the date of final payment or completion of any required audit, whichever is later. Records to be maintained include both financial records and service records. The Contractor shall grant access to all records pertaining to the Contract to FLVS's authorized representative.

The Contractor shall permit onsite access visits by designated FLVS employees or agents to conduct audits. These audits may require FLVS access to records and data, computers or communications devices, and other materials whether owned or operated by the Contractor. Access may include, but is not limited to, user level and/or system level access to any computing or communications device; access to information (electronic, hardcopy, etc.) that may be produced, transmitted or stored on the Contractor's equipment or premises; access to work areas; and access to interactively monitor and log traffic on the Contractor's networks.

- 13.24** Solicitation. The Contractor warrants that no person or selling FLVS (except bona fide employees or selling agents maintained for the purpose of securing business) has been employed or retained to solicit and secure the Contract upon an agreement or understanding for commission, percentage, brokerage or contingency.
- 13.25** Immunity from Liability. Every person who is a party to the Contract is hereby notified and agrees that FLVS is immune from liability and suit for or from Contractor's and/or subcontractors' activities involving third parties and arising from the Contract.
- 13.26** Public Records. Florida Virtual School is a public agency subject to Chapter 119, Florida Statutes. The Contractor shall comply with Florida's Public Records Law including: (a) keeping and maintaining public records that ordinarily and necessarily would be required by the BOARD in order to perform the service; (b) providing the public with access to public records on the same terms and conditions that the BOARD would provide the records and at a cost that does not exceed the cost provided in chapter or as otherwise provided by law; (c) ensuring that public records that are exempt or that are confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law; and (d) meeting all requirements for retaining public records and transfer at no cost to the BOARD, all public records in possession of the contractor upon termination of the Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. All records stored electronically must be provided to the BOARD in a format that is compatible with the information technology systems of the BOARD. The parties agree that if the contractor fails to comply with a public records request, then Florida Virtual School must enforce the contract provisions in accordance with the contract and as required by Section 119.0701, Florida Statutes.

**IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT, [CustodianofRecords@flvs.net](mailto:CustodianofRecords@flvs.net) , OR BY PHONE 407-513-3325, OR BY MAIL TO: 2145 METROCENTER BLVD., SUITE 100, ORLANDO, FL 32835.**

- 13.27** Debarred, Suspended, and Ineligible Status. Contractor certifies that the Contractor and/or any of its subcontractors have not been debarred, suspended, or declared ineligible by any Agency of the State of Florida or as defined in the Federal Acquisition Regulation (FAR) 48 C.F.R. Ch.1 Subpart 9.4. Contractor will immediately notify FLVS if Contractor is debarred by the State or placed on the Consolidated List of Debarred, Suspended, and Ineligible Contractors by a federal entity.



- 13.28 Use of Name or Intellectual Property.** Contractor agrees it will not use the name or any intellectual property, including but not limited to, FLVS trademarks or logos in any manner, including commercial advertising or as a business reference, without the expressed prior written consent of FLVS.
- 13.29 Taxes.** FLVS is exempt from Federal Excise Taxes, and no payment will be made for any taxes levied on Contractor's employee's wages. FLVS is exempt from State and Local Sales and Use Taxes on the services. Tax Exemption Certificates will be furnished upon request. Contractor or an authorized subcontractor has provided FLVS with a sworn verification regarding the filing of unemployment taxes or persons assigned by Contractor to perform Services, which verification is incorporated herein by reference.
- 13.30 Certification Regarding Sales and Use Tax.** By executing the Contract, the Contractor certifies it is registered with the State Department of Revenue, collects, and remits State sales and use taxes as required by Florida law. The Contractor also acknowledges that FLVS may declare the Contract void if the above certification is false. The Contractor also understands that fraudulent certification may result in FLVS or its representative filing for damages for breach of contract.
- 13.31 Delay or Impossibility of Performance.** Neither party shall be in default under the Contract if performance is delayed or made impossible by an act of God. In each such case, the delay or impossibility must be beyond the control and without the fault or negligence of the Contractor. If delay results from a subcontractor's conduct, negligence or failure to perform, the Contractor shall not be excused from compliance with the terms and obligations of the Contract.
- 13.32 Obligations Beyond Contract Term.** The Contract shall remain in full force and effect to the end of the specified term or until terminated or canceled pursuant to the Contract. All obligations of the Contractor incurred or existing under the Contract as of the date of expiration, termination or cancellation will survive the termination, expiration or conclusion of the Contract.
- 13.33 Counterparts.** FLVS and the Contractor agree that the Contract has been or may be executed in several counterparts, each of which shall be deemed an original and all such counterparts shall together constitute one and the same Order.
- 13.34 Further Assurances and Corrective Orders.** FLVS and the Contractor agree that they will, from time to time, execute, acknowledge and deliver, or cause to be executed, acknowledged and delivered, such supplements hereto and such further Orders as may reasonably be required for carrying out the expressed intention of the Contract.
- 13.35 Transition Cooperation and Cooperation with other Contractors.** Contractor agrees that upon termination of this Contract for any reason, it shall provide sufficient efforts and cooperation to ensure an orderly and efficient transition of services to FLVS or another contractor. The Contractor shall provide full disclosure to FLVS and the third-party contractor about the equipment, software, or services required to perform the Services for FLVS. The Contractor shall transfer licenses or assign agreements for any software or third-party services used to provide the Services to FLVS or to another contractor.
- Further, in the event that FLVS has entered into or enters into agreements with other contractors for additional work related to Services rendered under the Contract, Contractor agrees to cooperate fully with such other contractors. Contractor shall not commit any act, which will interfere with the performance of work by any other contractor.
- 13.36 Order of Preference.** In the case of any inconsistency or conflict among the specific provisions of FLVS Standard Master Service Contract Terms and Conditions (including any amendments accepted by both FLVS and the Contractor attached hereto), the RFX (including any subsequent addenda), and the Contractor's Response, any inconsistency or conflict shall be resolved as follows:

- (i) First, by giving preference to the specific provisions of FLVS Standard Master Service Contract Terms and Conditions.
- (ii) Second, by giving preference to the specific provisions of the SOW.
- (iii) Third, by giving preference to the specific provisions of the RFX, Contractor's Response, except that objections or amendments by a Contractor that have not been explicitly accepted by FLVS in writing shall not be included in this Contract and shall be given no weight or consideration.

**13.37 Intent of References to Bid Documents.** The references to the parties' obligations, which are contained in this document, are intended to supplement or clarify the obligations as stated in the RFX and the Contractor's Response. The failure of the parties to make reference to the terms of the RFX or the Contractor's Response in this document shall not be construed as creating a conflict and will not relieve the Contractor of the contractual obligations imposed by the terms of the RFX and the Contractor's Response. The contractual obligations of FLVS cannot be implied from the Contractor's Response. Contractor may be suspended, terminated, or debarred if it is determined that:

- (i) Contractor has made false certification here or in the RFX; or
- (ii) Contractor fails to carry out the requirements of this contract.

**13.38 Severability.** In the event any provision of this Agreement (or portion thereof) is determined by a court of competent jurisdiction to be invalid, illegal, or otherwise unenforceable, such provision shall be deemed to have been deleted from this Agreement, while the remainder of this Agreement shall remain in full force and effect according to its terms.

**13.39 Travel.** If Anticipated Contractor travel costs are included in contractor rates and fees for scope deliverables. FLVS will not be invoiced separately for Contractor travel expenses related to this anticipated travel. If Contractor arranges for their own travel, FLVS will only reimburse up to what is considered acceptable based on FLVS travel policy (Exhibit X - TR001).

#### **14 FEDERAL PROVISIONS [THESE PROVISIONS MAY NOT BE APPLICABLE TO THIS CONTRACT BUT FLVS IS REQUIRED BY THE UNIFORMED GRANT GUIDANCE TO HAVE THIS IN ALL CONTRACTS UTILIZING FEDERAL FUNDS]**

**14.1** Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

**14.2** All Contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be affected and the basis for settlement.

**14.3 Rights to Inventions Made Under a Contract or Agreement.** If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by

Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

**14.4 Environmental Protection.** Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and sub grants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the regional office of the Environmental Protection Agency (EPA).

**14.5 Debarment and Suspension Certification.** Debarment and Suspension (Executive Orders 12549 and 12689) - A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

**14.6 Lobbying Certification Contract must adhere to:** Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier-to-tier up to the non-Federal award.

**ATTACHMENT 2**  
**FLVS STANDARD MASTER SERVICE CONTRACT**

**Solicitation**

[\[Attach Solicitation Document\]](#)

**ATTACHMENT 3**  
**FLVS STANDARD MASTER SERVICE CONTRACT**

**Solicitation Addendum**

**[Attach Solicitation Addendum if Any]**

**ATTACHMENT 4**  
**FLVS STANDARD MASTER SERVICE CONTRACT**

**Contractor's Final Response**

**[Insert Contractor's Proposal]**

**ATTACHMENT 5**  
**FLVS STANDARD MASTER SERVICE CONTRACT**  
**Statement of Work (SOW) & Change Orders**

**[Insert Statement of Work/Scope of Work (SOW) & Change Orders if any]**



FLORIDA VIRTUAL  
SCHOOL

**Florida Virtual School**  
**Statement of Work (SOW) #**  
**XXXXXX**

**Master Service Agreement #XXXXXX for: XXXXXX**

**1. Term of SOW:** Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_ **Project**

**2. Description and Scope**

This statement of work pursuant to the terms of the MSA# XXXXXX between FLVS and XXXXXX identified above is for the purpose of XXXXX. XXXXXX shall be paid as described below by Florida Virtual School.

**3. Project Timeline and Milestones**

| Project Schedule    | Milestone Due date |
|---------------------|--------------------|
| Kickoff             |                    |
|                     |                    |
|                     |                    |
|                     |                    |
| Completion Due Date |                    |

**Notes:**

- 

**4. Deliverables, Cost Structure and Payment Terms**

Payment to the Contractor will be provided as described in MSA #XXXXXX. Any changes must be mutually agreed upon through issuance of FLVS Change Order.

| Deliverables | Cost |
|--------------|------|
|              | \$   |



|            |    |
|------------|----|
|            | \$ |
|            | \$ |
|            | \$ |
|            | \$ |
| Completion | \$ |
| TOTAL      | \$ |

**Notes:**

- No work may begin until FLVS purchase order is issued to the Contractor. Services shall be made as specified on the purchase order or reference the corresponding Contractual agreement governing the specifications and terms and conditions. Contractor will not be compensated for work performed without receipt of a purchase order.
- Invoices will be based upon actual quantities delivered and accepted by FLVS. If fewer items are delivered and accepted, a reduction on the final invoice shall apply.
- Any invoice submitted as a result of this SOW shall be itemized reflecting the items on the purchase order. Unless otherwise stated in the contract, "lump sum" invoices shall not be submitted nor will be accepted for multiple line purchase orders. FLVS will only pay the dollar amounts authorized on the purchase order.
- Contractor will not invoice FLVS for amounts in excess of the above stated costs without prior written approval from FLVS (issuance of Statement of Work Change Order and revised Purchase Order).
- No verbal modifications to this Statement of Work may be made, including, but not limited to, scope, deliverables, milestones, and cost. Any and all modifications to this SOW must be made in writing via Statement of Work Change Order signed by both parties.
- Invoices must include the FLVS purchase order number and be sent to FLVS Accounts Payable ([accountspayable@flvs.net](mailto:accountspayable@flvs.net)) with a copy to XXXXX at [XXX@flvs.net](mailto:XXX@flvs.net).

**5. Liquidated Damages *(Include when applicable)***

Liquidated damages shall apply if the Contractor fails to meet the project schedule (Section 3) as specified within the Statement of Work. FLVS may, at its discretion, elect to assess liquidated damages in the amount of \$XXX.XX per calendar day until the earlier of the date that:

- the Contractor completes the task
- FLVS secures the deliverable elsewhere.
- FLVS needs otherwise cease

**Set-Off Against Sums Owed by the Contractor.** In the event that the Contractor owes FLVS any sum under the terms of the Contract, pursuant to any judgment, or pursuant to any law, FLVS may set off the sum owed against any sum owed by FLVS to the Contractor in FLVS sole discretion.

**6. Authorized Person to Receive Contract/Approval Notices for:**

|                    |              |
|--------------------|--------------|
| <u>Contractor:</u> | <u>FLVS:</u> |
| Name:              | Name:        |
| Phone:             | Phone:       |
| Email:             | Email:       |

**Nothing contained in this Statement of Work is agreeing to or authorizing any change in the terms of the MSA #XXXXXXXXXX, nor is this agreement authorizing or agreeing to any financial commitment beyond that authorized by the FLVS Board of Trustees in the Master Service Agreement.**

**Intellectual Property Ownership.** Except for the rights expressly granted in this Agreement, neither party shall acquire any claims to or rights in any Background Intellectual Property of the other party. All right, title and interest in and to any course content or materials created by Contractor as part of the services provided hereunder including without limitation all rights of patent, copyright, trademark, and other intellectual property and proprietary rights, shall vest in FLVS and shall be deemed a “work made for hire,” as that term is defined in the U.S. Copyright Act (17 U.S.C. § 101), by Contractor for FLVS. If the course content, materials or any portion thereof may not be considered a “work made for hire,” Contractor hereby assigns to FLVS its entire right, title and interest in and to such course content and materials.

**IN WITNESS WHEREOF, this Contract has been executed by the parties hereto.**

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**Contractor**

Contractor’s Name *(If other than an individual, state whether a corporation, partnership, etc.)*

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By *(Authorized Signature)*

Date Signed

---

Printed Name and Title of Person Signing

---

Address

---

**FLVS**

FLVS Name

---

By *(Authorized Signature)*

Date Signed

---

Printed Name and Title of Person Signing

---

Address

**2145 Metro Center Blvd. Suite 200, Orlando, FL 32835**

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| <i>SOW Reviewed by:</i> | <i>Signature:</i> | <i>Date of Review:</i> |
|-------------------------|-------------------|------------------------|
|                         |                   |                        |
|                         |                   |                        |



**ATTACHMENT 6**  
**FLVS STANDARD MASTER SERVICE CONTRACT**

**Amendments to the "FLVS Standard Master Service Contract Terms and Conditions" and  
Any FLVS Special Terms and Conditions**

FLVS Standard Master Service Contract Terms and Conditions are hereby modified as follows:

**[Insert Amendments (if any)]**