REQUEST FOR PROPOSAL

RFP NO. EDR2022A

Updated March 8, 2022

RFP TITLE: ENTERPRISE CLOUD BASED ASSESSMENT MANAGEMENT PLATFORM

All proposals MUST BE RECEIVED electronically by 5:00pm Eastern Daylight Time on March 23, 2022

Prices must remain firm for: 120 DAYS AFTER PROPOSAL CLOSING DATE AND TIME

Proposal Bond Requirements: NONE
Performance, Labor, and Material Bond requirements: NONE
Pre-proposal Conference: NONE

Important: Your quotation will be jeopardized if any portion of this inquiry is not complete. No proposal will be accepted after the date and time stated above.

Anne Matthews, Director of Programs
Educators Rising
PDK International

NOTE: Prospective Offeror’s that have received this document from a source other than Educators Rising should immediately contact Educators Rising and provide their name and e-mail address so that any amendments to the Bid/RFP or other communications can be sent to them. Failure to contact Educators Rising may result in non-receipt of important information.
EDUCATORS RISING

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Updated 3/8/2022
1 PROPOSAL AND CONTRACT INFORMATION

1.1 Intent

It is the intent of this Request for Proposal to provide Educators Rising (the “Organization”) with an Assessment Management System, in accordance with the terms, conditions, and specifications described herein. In the event that a special condition is contradictory to a general condition, the special condition shall prevail. Respondents to the RFP will be referred to as “Offerors” and “Proposers.” The Offeror to whom the contract is awarded will be referred to as the “Contractor.”

1.2 Bid Submittal Due Date

All responses to this Request for Proposal must be submitted electronically, in two separate attachments. One attachment shall consist of the Technical Proposal, and the second attachment shall consist of the Price Proposal. Both attachments shall be sent together, in a single email. All responses to this Request for Proposal must be received by 5:00 p.m., March 23, 2022, Eastern Daylight Time (EDT). Electronic proposals shall be sent to the following email address by the submittal deadline date and time: programs@educatorsrising.org.

No responses will be accepted after this date and time. In the event that the Organization is closed on the RFP closing date, due to an unforeseen circumstance, the RFP will close at the stated time on the next open business day, unless the Offeror is notified otherwise.

1.3 Contact Information

Request for information or technical questions related to this solicitation should be directed to Anne Matthews, Director of Programs, via e-mail to programs@educatorsrising.org. The Bidder may not initiate contact with any other organizational representative about this bid. All inquiries and questions must be submitted in writing via email and received by 4:00 pm, March 11, 2022. All questions received by the noted deadline will be answered and sent to all proposing firms via issuance of an addendum. No questions will be accepted after this date.

1.4 Proposal Validity

Offeror’s must hold their proposal prices for 120 days after the award date. In the event that the awarded Contractor is unable to perform the contract, the Organization reserves the right to resolicit the contract or to award the contract to the next highest evaluated Offeror.

1.5 Submitted Pricing

Pricing must be submitted on the Price Proposal. The prices offered on the Price Proposal must include all charges, costs, and fees incurred in the delivery of this procurement. No allowance will be made at a later date for additional charges due to the Offeror’s omission. Payment discounts, if offered, will be taken when appropriate, but will not be considered in the evaluation for award. The Organization reserves the right to request additional related services in support of its operations, and fees for those services shall be negotiated accordingly.
1.6 References

The Offeror must provide three (3) references, with whom Offeror has provided similar services within the past three years. All references must include organization name, contact name, mailing and email address, telephone number, and service dates. Cited references must be able to confirm, without reservation, the Offeror’s ability to provide services in accordance with the requirements contained in this solicitation. The Organization reserves the right to reject a proposal based on an unsatisfactory reference; use itself as a reference, if applicable; request additional references; contact any non-reference clients that have utilized Offeror’s services; or require a site visit to one or more of the Offeror’s reference locations.

1.7 Subcontractors

The Organization seeks proposals from Contractors performing all requested services and will enter into an agreement only with the selected Offeror. No portion of the work shall be subcontracted without the prior written consent of the Organization throughout the terms of the contract, including renewals and extensions. In the event the Contractor desires to subcontract part of the services specified herein, the Contractor shall furnish the company or individual name(s), contact name, mailing and e-mail addresses, qualifications, and experience of the proposed subcontractor(s), as well as a description of the services to be performed by the subcontractor. The primary Contractor shall remain fully liable for the work performed by the subcontractor(s) and shall assure compliance with all requirements of the contract if approved by the Organization. The Organization reserves the right, in its sole discretion, to reject any proposed subcontractor.

1.8 Proposal Evaluation

Proposals submitted in response to this solicitation will include evaluation as follows:

**Offeror is responsible**—Offeror demonstrates ability to provide products and/or services that can meet or exceed requirements. The following criteria will be used to determine responsibleness:

- Offeror has the equipment, ability, and experience to perform the work as stated in the specifications listed in this RFP.
- Offeror is financially stable.

**Offeror is responsive**—Offeror follows RFP submission instructions and provides all requested materials. The following criteria will be used to determine responsiveness:

- Offeror has favorable references that can confirm its ability to provide the products and/or services as stated in the specifications listed in this RFP.
- Offeror has provided all documentation and samples requested in the Scope of Work/Specifications.
1.9 Proposal Rejection

The Organization reserves the right to reject any or all offers received as a result of this Request for Proposal. Offers may be rejected for any of the following reasons:

- Failure to meet the mandatory specifications and requirements.
- Failure to respond in a timely manner to a request for additional information, data, etc.
- Failure to supply appropriate and favourable client references.
- Submittal of an incomplete Price Proposal page.
- Failure to sign the proposal.
- Submittal of conditional, alternate or multiple proposals.
- Failure to demonstrate that it is qualified to carry out the obligations of the contract and to implement and support the work specified herein.
- Failure to provide samples and/or demonstration materials that are representative of the quality level sought by the Organization

1.10 Contract Award

An award will be made in the best interest of the Organization to the highest evaluated and most responsible, responsive Offeror that can meet or exceed the terms, conditions, and specifications of this solicitation, and who meet the technical minimum evaluation points. Evaluation of Offeror’s will be based on Offeror qualifications and references. The evaluation for award will be made on the basis of payment to the Contractor in Net 30 Days from the date an acceptable invoice is received by Educators Rising. The Organization may cancel this Request for Proposal or reject any or all proposals in whole or in part.

1.11 Contract Documents

The Request for Proposal in its entirety, the Offeror’s proposal, and the Organizations purchase order will form the contract. Offeror’s requiring their signed contract or terms and conditions separate and apart from the foregoing must submit such a contract, terms, and conditions with their response. The contract will be examined and evaluated along with the Offeror’s proposal. The organization reserves the right to reject the Offeror’s contract form and terms and conditions.

1.12 Contract Term

The initial term of this contract will be from April 15, 2022 through June 30, 2023. Beyond the initial term, at the sole option of the Organization, the contract may be renewed for additional one-year terms, subject to funding availability and need, and provided that the Contractor has been in compliance with the terms and conditions of the contract and its service has been satisfactory. The Organization reserves the right to amend its requirements during the life of the contract to meet the needs of the Organization.
1.13 Contract Pricing

Contract prices shall remain fixed for first year of contract. Requests for price increases after first year of contract must be submitted in writing within 60 days of expiration of year one contract term. The same will apply for all successive contract renewal periods, should the Organization elect to exercise them. Any approved increase will take effect at the start of a contract renewal term. All contract price increase requests, along with supporting documentation must be sent to Educators Rising. The Organization reserves the right to request additional supporting documentation.

1.14 Contract Modification and Amendment

The Organization retains the unilateral right to require changes in the Scope of Work as long as the changes are within the general scope of work to be performed hereunder. The Organization, without invalidating the contract documents, may submit a written request to order extra work or to make changes to the agreement by altering, adding to, or deducting from the work, and the contract sum shall reflect such changes. Price adjustments must be accepted, in writing, by the Organization before the Contractor performs additional work on the project. The Contractor cannot accept purchase orders/requests for services or products that are not covered in this contract or make changes to the scope of work unless a price for those services or products has been negotiated with Educators Rising, and the Contractor has received a signed contract amendment from Educators Rising.
2 SECTION 2 – BACKGROUND AND SCOPE OF WORK

2.1 Background

Educators Rising is cultivating a new generation of highly skilled educators by guiding young people on a path from high school through college and into their teaching careers. By working with aspiring educators who reflect the demographics of their communities and who are passionate about serving those communities through public education, Educators Rising is changing the face of teaching.

Educators Rising affiliates provide additional support and programming for members within their state or region. We are committed to providing affiliates with resources and information to be effective partners, and we work hand-in-hand with our affiliate coordinators to bring quality opportunities to our rising educators.

2.2 Scope of Services

Educators Rising seeks a qualified vendor to provide an Assessment Management System. Educators Rising wants to improve how it manages its institutional effectiveness efforts as it relates to assessment. This system will be used at various levels of the Organization including but not limited to tracking and planning of success initiatives and accreditation progress, assessment of administrative units and special programs, program review for academic programs, and learning outcomes assessment.

Educators Rising is seeking proposals from Assessment Platforms in order to develop and administer assessments and related services that can meet the current and future needs of the Educators Rising program in the most cost-effective manner.

We are interested in an Assessment Platform that contains the following components:

<table>
<thead>
<tr>
<th>Desired Feature</th>
<th>Description of the Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Item formats</strong></td>
<td>Able to have multiple choice, short answer, and essay topic items</td>
</tr>
<tr>
<td><strong>Test Creation and Delivery</strong></td>
<td>Can assemble tests from test items</td>
</tr>
<tr>
<td></td>
<td>Can rank difficulty of items to create similar tests that can randomize answer choice order and question order</td>
</tr>
<tr>
<td></td>
<td>Able to allow review of both wrong and right answers - provide answer rationales</td>
</tr>
<tr>
<td></td>
<td>Can have multiple test administrators - provide flexibility for various administrators to assign to their independent groups or classes</td>
</tr>
<tr>
<td></td>
<td>Needs ability to let users organize and administer tests without central input</td>
</tr>
<tr>
<td></td>
<td>Provide gating of exams or questions</td>
</tr>
<tr>
<td></td>
<td>Provide the possibility of retakes</td>
</tr>
</tbody>
</table>
Scoring/Grading

<table>
<thead>
<tr>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Must be able to grade</td>
</tr>
<tr>
<td>Ideally be able to grade essays using AI or rubrics</td>
</tr>
<tr>
<td>Can curve scoring as needed</td>
</tr>
<tr>
<td>Can change item difficulties and target scoring</td>
</tr>
</tbody>
</table>

User Experience

<table>
<thead>
<tr>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide sample items – have a short practice test to provide tutorial</td>
</tr>
<tr>
<td>on formats or include a help feature (e.g. click on an icon for</td>
</tr>
<tr>
<td>additional item instructions/tutorial)</td>
</tr>
<tr>
<td>Certificates of completion – awarded based on performance</td>
</tr>
<tr>
<td>Student capability to login and view past scores</td>
</tr>
<tr>
<td>Ability to provide modifications for SWD/translation – multilingual</td>
</tr>
</tbody>
</table>

Analytics and Reporting

<table>
<thead>
<tr>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not dependent on a school LMS – so does not have to be an LMS but</td>
</tr>
<tr>
<td>could be one that is crippled for assessment. We will have need for</td>
</tr>
<tr>
<td>an LMS so assessment engines that are linked to or part of an LMS are</td>
</tr>
<tr>
<td>preferred</td>
</tr>
<tr>
<td>API with AMS/CMS/CRM</td>
</tr>
<tr>
<td>SCORM compliance in case we need to expand to LMS if it is an LMS</td>
</tr>
<tr>
<td>Survey/feedback capability</td>
</tr>
</tbody>
</table>

Security

<table>
<thead>
<tr>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test security feature</td>
</tr>
<tr>
<td>User and Data Privacy</td>
</tr>
<tr>
<td>Maintain ownership of our IP and analytics – no extra fees to access</td>
</tr>
<tr>
<td>our data</td>
</tr>
</tbody>
</table>

Support

<table>
<thead>
<tr>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical support from vendor for users</td>
</tr>
</tbody>
</table>

2.3 Project Award and Schedule

The anticipated timeframe for issuing Intent of award to the highest evaluated and most responsible, responsive Offeror is **April 6, 2022**.

2.4 Current Systems

2.4.1 Administrative Systems

Any proposed platform should be compatible with other platforms through the use of APIs. Where possible, the proposed platform should be able to use single sign-on and integration with gradebook functions.
3 SECTION 3 – QUALIFICATIONS AND SYSTEM REQUIREMENTS

3.1 Minimum Qualifications Requirements

The Proposer must have the necessary personnel, experience, certification, knowledge, skills, abilities, licenses, facilities, equipment, supplies, insurance, and technology in place to fulfill the requirements of the resulting contract and to provide the requested services on a timely basis and in compliance with all municipal, county, state, and federal codes, ordinances, regulations, and laws and industry best practices and standards.

Must have a minimum of five (5) years’ experience providing a cloud-based media management platform to educational institutions. Describe your company’s experience, and history of providing an Assessment Management System to higher education customers.

Bidders shall provide a minimum of two (2) examples of successful projects similar in size and scope to Educators Rising (within budget, on time, within scope).

The Offeror must provide three (3) references within the past three years that are capable of confirming the Offeror’s experience in providing the same or similar level of services.

3.2 General Requirements

Please describe how your assessment management system would address the following:

- Provide technological solutions to support evaluation and assessment efforts such as student learning outcomes assessment, program review and tracking student success initiatives.
- Facilitate opportunities for users to share information and results internally and externally.
- Offer technology for collecting and analysing assessment data.
- Provide technology for generating curriculum maps.
- Generate reports that can be used for various purposes.
- Support accreditation efforts.
- Provide an intuitive user interface.
- Connect various assessment initiatives to each other within the assessment management system.
- Provide a cloud-based system.

3.3 Sandbox Environment

Vendors who advance to the next round for a product demonstration should also create a “sandbox” environment or provide a free trial so that Educators Rising RFP review committee can directly experience the system during the RFP scoring process.
3.4 Training Requirements

Describe the training provided for all essential personnel on the use and administration of the solution. The vendor should indicate training options, including on-site and certification programs. Additional training should be available when necessary for a fee. Provide course descriptions, cost, and locations of training options. An itemized list of training costs, including travel costs, should be included in the “Costs” section of your proposal.

The proposal must include a detailed training plan covering all training requirements and must include sample training and operations manuals for all training required by this RFP, including the following:

- Method of training
- Length of training
- Scope of training
- Educators Rising personnel who should attend
- A list of training materials provided

3.5 Maintenance and Support Requirements

- Offeror must explain ongoing maintenance and support for the proposed software and hardware options.
- Ongoing maintenance fees should include free vendor-developed software updates once a year or more.

3.6 Warranty and Disaster Recovery Requirements

Please describe the System warranty proposed by the Vendor.

At the option of Educators Rising, the Vendor must be willing to participate in a disaster recovery plan by agreeing to make available all hardware and software on a temporary, as-needed basis. Please describe this program.
4 PROPOSAL EVALUATION AND AWARD

4.1 Evaluation Process

All proposals submitted will first be examined for responsiveness and completeness by the Organizations evaluation team. Those proposals which do not clearly respond to the proposal submission requirements may be rejected at the discretion of the Organization. Those proposals not rejected will be evaluated to determine which offer best meets the requirements in the RFP and is in the best interest of the Organization. Proposal information will be evaluated and scored by the Organization, and its decision will be final.

Technical Proposals will be opened first at the date and time advised in the RFP documents and evaluated by an Organization Evaluation Committee. The Price Proposals remain sealed and are held by the Procurement Office. Evaluation of Technical Proposals will be based on the criteria provided in the RFP, the substantiated ability of an Offeror to perform the required services, and the Offeror’s responsiveness to the RFP requirements.

4.2 Evaluation Criteria

Technical Proposals will be initially evaluated and scored by the Organization Evaluation Committee based on the following criteria:

<table>
<thead>
<tr>
<th>Description of Criteria</th>
<th>Maximum Point Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Functionality and System Requirements</td>
<td>40 (maximum available points)</td>
</tr>
<tr>
<td>Qualification /Past Performance</td>
<td>10 (maximum available points)</td>
</tr>
<tr>
<td>Project Approach and Implementation</td>
<td>10 (maximum available points)</td>
</tr>
<tr>
<td>Sandbox/Free Trial</td>
<td>20 (maximum available points)</td>
</tr>
<tr>
<td>Oral Presentation Demonstration</td>
<td>10 (maximum available points)</td>
</tr>
<tr>
<td>Price Proposal</td>
<td>10 (maximum available points)</td>
</tr>
</tbody>
</table>

Highest possible evaluation score 100

4.3 Technical Proposal

System Requirements and Functionality, Qualifications and Past Performance, Project Approach and Implementation represent the Technical Proposal. Award will be made in aggregate, to the highest evaluated, most responsive, responsible Offeror meeting all RFP terms, conditions, and specifications.

4.4 Oral Presentation/Demonstration

Following the initial scoring by the evaluation committee respondents, qualified applicants will be invited to give a presentation of their proposed solutions and capabilities as part of the evaluation process.
5 PROPOSAL SUBMISSION

5.1 Electronic Proposal Submission Instructions

The following electronic proposal submission requirements supersede the delivery of bids.

All Offeror’s proposals must be submitted electronically, via one email. In the email, attach two separate PDF file attachments, by 5:00 p.m. Eastern Daylight Time (EDT), on March 23, 2022. One attachment shall include the Technical Proposal, and the second attachment shall include the Price Proposal. Subject line of email must include “Vendor Response to RFP No. EDR2022A, Assessment Management System.”

Email Address: programs@educatorsrising.org

Any proposal received electronically after the specified deadline will be automatically rejected. The subject line of the email must include the following: Request for Proposal (RFP) bid number and title.

Proposals shall be certified, wet signed, and dated by a bona-fide agent of the Offeror. Failure to include all required submittals may render the Proposal nonresponsive. The Organization will reject any offer without an authorized signature.

5.2 Required Proposal Submittals

A submittal consisting of the Technical Proposal and the Price Proposal is required when responding to this Request for Proposal.

5.2.1 Technical Proposal

This section must contain a detailed description of the services offered by the Offeror in response to this RFP, along with the below mentioned.

- Transmittal Letter: The transmittal letter must be prepared on the Offeror’s business stationery. The letter must introduce the company and give a brief history of the organization and the contact person responsible for the project. The letter should summarize the key points of the proposal along with the above.
- Statement of Qualifications: This contract requires specialized services. Offeror’s statement of qualifications must address the following:
  - Professional qualifications and technical competence of the firm, subcontractors, and staff proposed for the performance of the required services.
  - Previous demonstrated experience.
  - Offeror’s corporation/organization size, web presence, length of time the organization has been providing the required services listed herein, and key business relationships.
- Project Approach and Timelines: Offeror shall submit a project approach, detailing assessment process. Approach must include completion timelines consistent with the
completion date of the project. Offer shall include specific plans and methodology for providing the required services.

- References: The Offeror must submit three (3) references from current or former customers within the past three (3) years that are capable of confirming the Offeror’s experience in providing the same or similar level of services.
  - The proposal must include the names and telephone numbers of three references. Cited references must be able to confirm, without reservation, the Offeror’s ability to provide these services in accordance with the requirements in this RFP.

- Subcontractors (If any): Each Offeror must list the subcontractors to be used in the performance of this contract. The Organization reserves the right to approve or disapprove any subcontractor who will be performing work related to this project.

5.2.2 Price Proposal

Proposals must include specific price information for complete Implementation, Support and Services as stated above. The system quoted must include all aspects and be sized to accommodate the Educators Rising environment as detailed in the RFP. The price(s) offered on the Price Proposal must include all charges and costs including travel and other reimbursable costs incurred in the delivery of this procurement. The Price Proposal must be completed in full, signed, and dated.
6 Pricing & Payment Terms

Price Proposals must include specific price information for complete Implementation, Support and Services as stated above. The system quoted must include all aspects and be sized to accommodate the Educators Risings environment as detailed in the RFP.

Vendors must indicate the cost to implement the system with all one-time costs. Separately indicate all on-going costs annually if the contract is extended beyond the first year.

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Base System – Software</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Customization (if any)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Additional modules required or proposed addons</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>3rd Party Software, if any, required for the operation of the system</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Installation/Integration Costs</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Technical and User Documentation</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Training including Training materials and travel</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td><strong>Assessment Management System – Maintenance Costs, to include, per year</strong></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td><strong>Total ongoing cost to include Updates, revisions for base systems and any utilities/3rd parties. New Releases/functionality and technical support/online help/customer service YEAR 2</strong></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Other cost (describe) (Optional)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>GRAND TOTAL</strong></td>
<td></td>
</tr>
</tbody>
</table>

The prices offered on the Price Proposal must include all charges, costs, and fees incurred in the delivery of this procurement. No allowance will be made at a later date for additional charges due to the Offeror’s omission. An award will be made in the best interest of the Educators Rising.

All pricing should be in USD ($).

By signing below, your firm agrees (i) to provide said goods and/or services as specified; (ii) that those goods and/or services shall be provided or performed in accordance with the bid specifications, stipulations and terms and conditions specified; (iii) and that your firm has read and agrees to Educators Rising’s terms, conditions, stipulations, and specifications and that your firm will adhere to said terms and conditions in any contract resulting.

__________________________  ____________________________
Company Name       Name

__________________________  ____________________________
Title       Authorized Signature and Date