



Purchase Order

Dispatch via Print

Department of Education
STATE DEPARTMENT OF EDUCATION
HODGE BUILDING
2500 N LINCOLN BLVD
OKLAHOMA CITY OK 731054599

Purchase Order	Date	Revision	Page
2659017183	03/26/2018		1
Payment Terms	Freight Terms	Ship Via	
45 Days	Free on board at Destination	Common	
Buyer	Phone	Currency	
Leanna Edmonds (090)	405/521-2133	USD	

Ship To: STATE DEPARTMENT OF EDUCATION
HODGE BUILDING
2500 N LINCOLN BLVD
OKLAHOMA CITY OK 731054599

Bill To: STATE DEPARTMENT OF EDUCATION
HODGE BUILDING
2500 N LINCOLN BLVD
OKLAHOMA CITY OK 731054599

Supplier: 0000378062
TOOLS4READING
2112 NW 60TH ST
OKLAHOMA CITY OK 73112-7315

Tax Exempt? Y Tax Exempt ID: 736017987

Line-Sch	Cat CD / Item Id	Description	Quantity	UOM	PO Price	Extended Amt	Due Date
1- 1	80101512 /	Coaching consultant to support early literacy best practices for specified districts and sites through OK SPDG and SSIP.	1.0000	EA	48,000.0000	48,000.00	03/26/2018

Initial contract period April 1, 2018 through September 30, 2018.

Total PO Amount 48,000.00

COMMENTS:

Contract Period: April 1, 2018 through September 30, 2018 with four (4), one-year options to renew.
Renewal 1: October 1, 2018 through September 30, 2019 bid pricing is \$72,000.00
Renewal 2: October 1, 2019 through September 30, 2020 bid pricing is \$72,000.00
Renewal 3: October 1, 2020 through September 30, 2021 bid pricing is \$72,000.00
Renewal 4: October 1, 2021 through September 30, 2022 bid pricing is \$72,000.00

Extension of Contract: The State may extend the term of this contract for up to ninety (90) day intervals if mutually agreed upon by both parties in writing.

Invoices: Invoices are to be submitted monthly by email to SDEaccounts payable@sde.ok.gov

Agency Contact Information
Irene Bowman, Contracting Officer
Phone: 405-522-5301
Email: Irene.Bowman@sde.ok.gov

Vendor Contact Information
Mary Dahlgren, President
Phone: 405-202-4045
Email: mary@tools4reading.com

Authorized Signature

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A. GENERAL PROVISIONS

A.1. Definitions

As used herein, the following terms shall have the following meaning unless the context clearly indicates otherwise:

- A.1.1. "Acquisition" means items, products, materials, supplies, services, and equipment a state agency acquires by purchase, lease purchase, lease with option to purchase, or rental pursuant to the Oklahoma Central Purchasing Act;
- A.1.2. "Addendum" means a written restatement of or modification to a Contract Document executed by the Supplier and State.
- A.1.3. "Bid" means an offer in the form of a bid, proposal, or quote a bidder submits in response to a solicitation;
- A.1.4. "Bidder" means an individual or business entity that submits a bid in response to a solicitation;
- A.1.5. "Solicitation" means a request or invitation by the State Purchasing Director or a state agency for a supplier to submit a priced offer to sell acquisitions to the state. A solicitation may be an invitation to bid, request for proposal, or a request for quotation; and
- A.1.6. "Supplier" or "vendor" means an individual or business entity that sells or desires to sell acquisitions to state agencies.

A.2. Bid Submission

- A.2.1. Submitted bids shall be in strict conformity with the instructions to bidders and shall be submitted with a completed Responding Bidder Information, OMES-FORM-CP-076, and any other forms required by the solicitation.
- A.2.2. Bids shall be submitted to the Central Purchasing Division in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.
- A.2.3. The required certification statement, "Certification for Competitive Bid and/or Contract (Non-Collusion Certification)", OMES-FORM-CP-004, must be made out in the name of the bidder and must be properly executed by an authorized person, with full knowledge and acceptance of all its provisions.
- A.2.4. All bids shall be legible and completed in ink or with electronic printer or other similar office equipment. Any corrections to bids shall be identified and initialed in ink by the bidder. Penciled bids and penciled corrections shall NOT be accepted and will be rejected as non-responsive. In addition to a hard copy submittal, the bidder will also be required to submit an electronic copy. Electronic responses must be submitted in the identical format contained in the solicitation (for example Microsoft Word, Microsoft Excel, but not Adobe PDF). In the event the hard copy of the price worksheets and electronic copy of the price worksheets do not agree, the electronic copy will prevail.
- A.2.5. All bids submitted shall be subject to the Oklahoma Central Purchasing Act, Central Purchasing Rules, and other statutory regulations as applicable, these General Provisions, any Special Provisions, solicitation specifications, required certification statement, and all other terms and conditions listed or attached herein—all of which are made part of this solicitation.

A.3. Solicitation Amendments

- A.3.1. If an "Amendment of Solicitation", OMES-FORM-CP-011, is issued, the bidder shall acknowledge receipt of any/all amendment(s) to solicitations by signing and returning the solicitation amendment(s). Amendment acknowledgement(s) may be submitted with the bid or may be forwarded separately. If forwarded separately, amendment acknowledgement(s) must contain the solicitation number and response due date and time on the front of the envelope. The Central

Purchasing Division must receive the amendment acknowledgement(s) by the response due date and time specified for receipt of bids for the bid to be deemed responsive. Failure to acknowledge solicitation amendments may be grounds for rejection.

- A.3.2. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the solicitation. All amendments to the solicitation shall be made in writing by the Central Purchasing Division.
- A.3.3. It is the bidder's responsibility to check the OMES/Central Purchasing Division website frequently for any possible amendments that may be issued. The Central Purchasing Division is not responsible for a bidder's failure to download any amendment documents required to complete a solicitation.

A.4. Bid Change

If the bidder needs to change a bid prior to the solicitation response due date, a new bid shall be submitted to the Central Purchasing Division with the following statement "This bid supersedes the bid previously submitted" in a single envelope, package, or container and shall be sealed, unless otherwise detailed in the solicitation. The name and address of the bidder shall be inserted in the upper left corner of the single envelope, package, or container. SOLICITATION NUMBER AND SOLICITATION RESPONSE DUE DATE AND TIME MUST APPEAR ON THE FACE OF THE SINGLE ENVELOPE, PACKAGE, OR CONTAINER.

A.5. Certification Regarding Debarment, Suspension, and Other Responsibility Matters

By submitting a response to this solicitation:

- A.5.1. The prospective primary participant and any subcontractor certifies to the best of their knowledge and belief, that they and their principals or participants:
 - A.5.1.1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by any Federal, State or local department or agency;
 - A.5.1.2. Have not within a three-year period preceding this proposal been convicted of or pled guilty or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) contract; or for violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - A.5.1.3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph A.5.1.2. of this certification; and
 - A.5.1.4. Have not within a three-year period preceding this application/proposal had one or more public (Federal, State, or local) contracts terminated for cause or default.
- A.5.2. Where the prospective primary participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to its solicitation response.

A.6. Bid Opening

Sealed bids shall be opened by the Central Purchasing Division at 5005 N. Lincoln Blvd. Suite 300, Oklahoma City, Oklahoma, 73105 at the time and date specified in the solicitation as Response Due Date and Time.

A.7. Open Bid / Open Record

Pursuant to the Oklahoma Public Open Records Act, a public bid opening does not make the bid(s) immediately accessible to the public. The procurement or contracting agency shall keep the bid(s) confidential, and provide prompt and reasonable access to the records only after a contract is awarded or the solicitation is cancelled. This practice protects the integrity of the competitive bid process and prevents excessive disruption to the procurement process. The interest of achieving the best value for the State of Oklahoma outweighs the interest of vendors immediately knowing the contents of competitor's bids. [51 O.S. § 24A.5(5)]

Additionally, financial or proprietary information submitted by a bidder may be designated by the Purchasing Director as confidential and the procurement entity may reject all requests to disclose information designated as confidential pursuant to 62 O.S. (2012) § 34.11.1(H)(2) and 74 O.S. (2011) § 85.10. Bidders claiming any portion of their bid as proprietary or confidential must specifically identify what documents or portions of documents they

consider confidential and identify applicable law supporting their claim of confidentiality. The State Purchasing Director shall make the final decision as to whether the documentation or information is confidential pursuant to 74 O.S. § 85.10. Otherwise, documents and information a bidder submits as part of or in connection with a bid are public records and subject to disclosure after contract award or the solicitation is cancelled.

A.8. Late Bids

Bids received by the Central Purchasing Division after the response due date and time shall be deemed non-responsive and shall NOT be considered for any resultant award.

A.9. Legal Contract

- A.9.1. Submitted bids are rendered as a legal offer and any bid, when accepted by the Central Purchasing Division, shall constitute a contract.
- A.9.2. The Contract resulting from this solicitation may consist of the following documents in the following order of precedence:
 - A.9.2.1. Any Addendum to the Contract;
 - A.9.2.2. Purchase order, as amended by Change Order (if applicable);
 - A.9.2.3. Solicitation, as amended (if applicable); and
 - A.9.2.4. Successful bid (including required certifications), to the extent the bid does not conflict with the requirements of the solicitation or applicable law.
- A.9.3. Any contract(s) awarded pursuant to the solicitation shall be legibly written or typed.

A.10. Pricing

- A.10.1. Bids shall remain firm for a minimum of sixty (60) days from the solicitation closing date.
- A.10.2. Bidders guarantee unit prices to be correct.
- A.10.3. In accordance with 74 O.S. §85.40, ALL travel expenses to be incurred by the supplier in performance of the Contract shall be included in the total bid price/contract amount.

A.11. Manufacturers' Name and Approved Equivalents

Unless otherwise specified in the solicitation, manufacturers' names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition. Bidder may offer any brand for which they are an authorized representative, and which meets or exceeds the specification for any item(s). However, if bids are based on equivalent products, indicate on the bid form the manufacturer's name and number. Bidder shall submit sketches, descriptive literature, and/or complete specifications with their bid. Reference to literature submitted with a previous bid will not satisfy this provision. The bidder shall also explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. Bids that do not comply with these requirements are subject to rejection.

A.12. Clarification of Solicitation

- A.12.1. Clarification pertaining to the contents of this solicitation shall be directed in writing to the Central Purchasing Contracting Officer specified in the solicitation, and must be prior to the closing date of the solicitation.
- A.12.2. If a bidder fails to notify the State of an error, ambiguity, conflict, discrepancy, omission or other error in the SOLICITATION, known to the bidder, or that reasonably should have been known by the bidder, the bidder shall submit a bid at its own risk; and if awarded the contract, the bidder shall not be entitled to additional compensation, relief, or time, by reason of the error or its later correction. If a bidder takes exception to any requirement or specification contained in the SOLICITATION, these exceptions must be clearly and prominently stated in their response.
- A.12.3. Bidders who believe proposal requirements or specifications are unnecessarily restrictive or limit competition may submit a written request for administrative review

to the contracting officer listed on the solicitation. This request must be made prior to the closing date of the solicitation.

A.13 Negotiations

- A.13.1. In accordance with Title 74 §85.5, the State of Oklahoma reserves the right to negotiate with one, selected, all or none of the vendors responding to this solicitation to obtain the best value for the State. Negotiations could entail discussions on products, services, pricing, contract terminology or any other issue that may mitigate the State's risks. The State shall consider all issues negotiable and not artificially constrained by internal corporate policies. Negotiation may be with one or more vendors, for any and all items in the vendor's offer.
- A.13.2. Firms that contend that they lack flexibility because of their corporate policy on a particular negotiation item shall face a significant disadvantage and may not be considered. If such negotiations are conducted, the following conditions shall apply:
- A.13.3. Negotiations may be conducted in person, in writing, or by telephone.
- A.13.4. Negotiations shall only be conducted with potentially acceptable offers. The State reserves the right to limit negotiations to those offers that received the highest rankings during the initial evaluation phase.
- A.13.5. Terms, conditions, prices, methodology, or other features of the bidders offer may be subject to negotiations and subsequent revision. As part of the negotiations, the bidder may be required to submit supporting financial, pricing, and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the offer.
- A.13.6. The requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the State determines that a change in such requirements is in the best interest of the State Of Oklahoma.

A.14. Rejection of Bid

The State reserves the right to reject any bids that do not comply with the requirements and specifications of the solicitation. A bid may be rejected when the bidder imposes terms or conditions that would modify requirements of the solicitation or limit the bidder's liability to the State. Other possible reasons for rejection of bids are listed in OAC 260:115-7-32.

A.15. Award of Contract

- A.15.1. The State Purchasing Director may award the Contract to more than one bidder by awarding the Contract(s) by item or groups of items, or may award the Contract on an ALL OR NONE basis, whichever is deemed by the State Purchasing Director to be in the best interest of the State of Oklahoma.
- A.15.2. Contract awards will be made to the lowest and best bidder(s) unless the solicitation specifies that best value criteria is being used.
- A.15.3. In order to receive an award or payments from the State of Oklahoma, suppliers must be registered. The vendor registration process can be completed electronically through the OMES website at the following link: <https://www.ok.gov/dcs/vendors/index.php>.

A.16. Contract Modification

- A.16.1. The Contract is issued under the authority of the State Purchasing Director who signs the Contract. The Contract may be modified only through a written Addendum, signed by the State Purchasing Director and the supplier.
- A.16.2. Any change to the Contract, including but not limited to the addition of work or materials, the revision of payment terms, or the substitution of work or materials, directed by a person who is not specifically authorized by the Central Purchasing Division in writing, or made unilaterally by the supplier, is a breach of the Contract. Unless otherwise specified by applicable law or rules, such changes, including unauthorized written Addendums, shall be void and without effect, and the supplier shall not be entitled to any claim under this Contract based on those changes. No oral statement of any person shall modify or otherwise affect the terms, conditions, or specifications stated in the resultant Contract.

A.17. Delivery, Inspection and Acceptance

- A.17.1. Unless otherwise specified in the solicitation or awarding documents, all deliveries shall be F.O.B. Destination. The supplier(s) awarded the Contract shall prepay all packaging, handling, shipping and delivery charges and firm prices quoted in the bid shall include all such charges. All products and/or services to be delivered pursuant to the Contract shall be subject to final inspection and acceptance by the State at destination. "Destination" shall mean delivered to the receiving dock or other point specified in the purchase order. The State assumes no responsibility for goods until accepted by the State at the receiving point in good condition. Title and risk of loss or damage to all items shall be the responsibility of the supplier until accepted by the receiving agency. The supplier(s) awarded the Contract shall be responsible for filing, processing, and collecting any and all damage claims accruing prior to acceptance.
- A.17.2. Supplier(s) awarded the Contract shall be required to deliver products and services as bid on or before the required date. Deviations, substitutions or changes in products and services shall not be made unless expressly authorized in writing by the Central Purchasing Division.

A.18. Invoicing and Payment

- A.18.1. Upon submission of an accurate and proper invoice, the invoice shall be paid in arrears after products have been delivered or services provided and in accordance with applicable law. Invoices shall contain the purchase order number, a description of the products delivered or services provided, and the dates of such delivery or provision of services. An invoice is considered proper if sent to the proper recipient and goods or services have been received.
- A.18.2. State Acquisitions are exempt from sales taxes and federal excise taxes.
- A.18.3. Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- A.18.4. Payment terms will be net 45. Interest on late payments made by the State of Oklahoma is governed by 62 O.S. § 34.72.
- A.18.5. Additional terms which provide discounts for earlier payment may be evaluated when making an award. Any such additional terms shall be no less than ten (10) days increasing in five (5) day increments up to thirty (30) days. The date from which the discount time is calculated shall be the date of a proper invoice.

A.19. Tax Exemption

State agency acquisitions are exempt from sales taxes and federal excise taxes. Bidders shall not include these taxes in price quotes.

A.20. Audit and Records Clause

- A.20.1. As used in this clause, "records" includes books, documents, accounting procedures and practices, and other data, regardless of type and regardless of whether such items are in written form, in the form of computer data, or in any other form. In accepting any Contract with the State, the successful bidder(s) agree any pertinent State or Federal agency will have the right to examine and audit all records relevant to execution and performance of the resultant Contract.
- A.20.2. The successful supplier(s) awarded the Contract(s) is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion and/or termination of the Contract. If an audit, litigation, or other action involving such records is started before the end of the seven (7) year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved, or until the end of the seven (7) year retention period, whichever is later.

A.21. Non-Appropriation Clause

The terms of any Contract resulting from the solicitation and any Purchase Order issued for multiple years under the Contract are contingent upon sufficient appropriations being made by the Legislature or other appropriate government entity. Notwithstanding any language to the contrary in the solicitation, purchase order, or any other Contract document, the procuring agency may terminate its obligations under the Contract if sufficient appropriations are not made by the Legislature or other appropriate governing entity to pay amounts due for

multiple year agreements. The Requesting (procuring) Agency's decisions as to whether sufficient appropriations are available shall be accepted by the supplier and shall be final and binding.

A.22. Choice of Law

Any claims, disputes, or litigation relating to the solicitation, or the execution, interpretation, performance, or enforcement of the Contract shall be governed by the laws of the State of Oklahoma.

A.23. Choice of Venue

Venue for any action, claim, dispute or litigation relating in any way to the Contract shall be in Oklahoma County, Oklahoma.

A.24. Termination for Cause

- A.24.1. The supplier may terminate the Contract for default or other just cause with a 30-day written request and upon written approval from the Central Purchasing Division. The State may terminate the Contract for default or any other just cause upon a 30-day written notification to the supplier.
- A.24.2. The State may terminate the Contract immediately, without a 30-day written notice to the supplier, when violations are found to be an impediment to the function of an agency and detrimental to its cause, when conditions preclude the 30-day notice, or when the State Purchasing Director determines that an administrative error occurred prior to Contract performance.
- A.24.3. If the Contract is terminated, the State shall be liable only for payment for products and/or services delivered and accepted.

A.25. Termination for Convenience

- A.25.1. The State may terminate the Contract, in whole or in part, for convenience if the State Purchasing Director determines that termination is in the State's best interest. The State Purchasing Director shall terminate the Contract by delivering to the supplier a Notice of Termination for Convenience specifying the terms and effective date of Contract termination. The Contract termination date shall be a minimum of 60 days from the date the Notice of Termination for Convenience is issued by the State Purchasing Director.
- A.25.2. If the Contract is terminated, the State shall be liable only for products and/or services delivered and accepted, and for costs and expenses (exclusive of profit) reasonably incurred prior to the date upon which the Notice of Termination for Convenience was received by the supplier.

A.26. Insurance

The successful supplier(s) awarded the Contract shall obtain and retain insurance, including workers' compensation, automobile insurance, medical malpractice, and general liability, as applicable, or as required by State or Federal law, prior to commencement of any work in connection with the Contract. The supplier awarded the Contract shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and shall provide the Central Purchasing Division and the procuring agency with evidence of such insurance and renewals.

A.27. Employment Relationship

The Contract does not create an employment relationship. Individuals performing services required by this Contract are not employees of the State of Oklahoma or the procuring agency. The supplier's employees shall not be considered employees of the State of Oklahoma nor of the procuring agency for any purpose, and accordingly shall not be eligible for rights or benefits accruing to state employees.

A.28. Compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007

By submitting a bid for services, the bidder certifies that they, and any proposed subcontractors, are in compliance with 25 O.S.

§1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and available at www.dhs.gov/E-Verify.

A.29. Compliance with Applicable Laws

The products and services supplied under the Contract shall comply with all applicable Federal, State, and local laws, and the supplier shall maintain all applicable licenses and permit requirements.

A.30. Special Provisions

Special Provisions set forth in SECTION B apply with the same force and effect as these General Provisions. However, conflicts or inconsistencies shall be resolved in favor of the Special Provisions.

B. SPECIAL PROVISIONS

B.1. Contract Award

This contract will be effective beginning the date of award through September 30, 2018, and may be renewed for an additional four (4), one-year periods with the same terms and conditions upon the sole discretion of the Oklahoma State Department of Education (OSDE).

B.2. Extension of Contract

The State may extend the term of this contract for up to ninety (90) day intervals if mutually agreed upon by both parties in writing.

B.3. Approval of Contract

The supplier shall not commence work, commit funds, incur costs, or in any way act to obligate the state until so notified in writing of the approval of the contract. The authorized state representative is the only individual who can transmit the approval to the supplier.

B.4. Subcontracting

The supplier may not subcontract any portion of this work to be accomplished without the written consent and approval of OSDE. The terms of this contract and such additional terms as OSDE may require shall be included in any approved subcontract and any approval of any subcontract shall not relieve the supplier of any responsibility for performance under this contract.

B.5. Travel

All travel under this contract shall be reimbursed subject to the terms and amounts set forth in the State Travel Reimbursement Act.

B.6. Supplier Employees or Agents

The provisions of this agreement bind supplier's employees or agents, if any, who perform services for the state under this agreement. At the request of the state, supplier shall provide adequate evidence that such persons are their employees or agents. In accordance with the section on "employment relationship", the state shall not be responsible for supplier's employees for any employee compensation insurance, paid vacation, or any other employee benefit.

B.7. Changes

All supplier's changes after award, including changes of the actual employees performing services on this contract, are subject to approval by the state.

B.8. Payment

- B.8.1.** Payment against this contract shall be firm fixed at the bid price, and OSDE shall not pay, nor be liable for any other additional costs.
- B.8.2.** No payments will be made to the supplier for services performed pursuant to this contract by unapproved employees of the contractor.

B.9. Invoices

- B.9.1.** Invoices are to be submitted monthly by email to SDEaccountspayable@sde.ok.gov

B.10. Definitions

- B.10.1.** LEAs-Local Educational Agencies
- B.10.2.** IDEA-Individuals with Disabilities Education Act
- B.10.3.** RTI-Response to Intervention
- B.10.4.** SPDG-State Personnel Development
- B.10.5.** SIG-State Improvement Grant
- B.10.6.** USDE-United States Department of Education
- B.10.7.** OSEP-Office of Special Education Programs
- B.10.8.** APR-Annual Performance Report

C. SOLICITATION SPECIFICATIONS

C.1. Purpose

The intent of this Request for Proposal (RFP) is to select a qualified supplier to develop and implement a coaching cycle to support early literacy best practices for specified districts and sites through OK SPDG and SSIP. The coaching cycle will guide and train site personnel on the development and implementation of early literacy best practices and fundamentals of literacy instruction. The coaching cycle must include an ongoing professional development training model that supports building level coaches, external

coaches, administrators, and classroom teachers that is literacy based and designed to meet the specific needs of the district.

C.2. Scope of Service

The supplier is to state in its response any experience it has with each requirement and exactly how it plans to comply with all requirements of this section, providing detailed information and stating affirmatively its understanding of the requirements.

- C.2.1.** The supplier must attend and participate in monthly OK SDPG III responsibilities and activities;
- C.2.2.** The supplier will attend and participate in monthly OK SDPG III leadership/planning meetings and work sessions;
- C.2.3.** The supplier will attend quarterly OK SPDG III sponsored or related activities, such as SPDG advisory committee meetings, OK SDPG III goal related meetings and trainings;
- C.2.4.** The supplier will be the primary trainer for literacy coaches and serve as a consultant;
- C.2.5.** The supplier will schedule all professional development trainings and supervise coaching assignments and report to the OSDE SPDG.

C.3. Performance Activities

The supplier is to state in its response any experience it has with each requirement and exactly how it plans to comply with all requirements of this section, providing detailed information and stating affirmatively its understanding of the requirements.

- C.3.1.** Coaching consultant will work with SPDG staff to provide literacy based training for external coaches, site coaches, administrators, and classroom teachers.
- C.3.2.** Coaching consultant will assist SPDG staff in analyzing literacy data and developing a plan of action to train and implement a coaching cycle.
- C.3.3.** Coaching consultant will work with SPDG staff to design a model for tracking literacy data at the district level and school sites.
- C.3.4.** Coaching consultant will evaluate the literacy coaches and literacy professional development of OK SPDG III activities.
- C.3.5.** Coaching consultant will be responsible for overseeing coaches' performance and analyzing literacy data.

C.4. Mandatory Requirements

Supplier shall provide information with their bid response which describes the following information. Failure to provide all of the mandatory requirements will deem the bidder non-responsive.

- C.4.1.** The supplier must have a minimum of three (3) years prior experience in education with a focus in literacy and professional development;
- C.4.2.** The supplier must have experience in literacy coaching and experience in coaching consultation.

C.5. Contract Monitoring System

- C.5.1.** Monthly literacy meetings that address coaching reports and data analysis.

C.6. Coaching Cycle

The coaching cycle must be developed around the focus areas of phonological awareness, phonics, vocabulary, assessment (screening and progress monitoring) and writing.

D. EVALUATION

D.1. Best Value

This RFP will be evaluated as best value in accordance with Title 74, §85. The best value criterion for this proposal is listed below and all proposals will be reviewed and awarded based on the following evaluation criteria:

- D.1.1.** H.1. Price
- D.1.2.** C.2. Scope of Service
- D.1.3.** C.3 Performance Activities

D.2. Best and Final Offer

The state may request best and final offers if deemed necessary, and shall determine the scope and subject of any best and final request. However, the supplier should not expect an opportunity to strengthen its offer and should submit its best offer based on the terms and conditions set forth in the solicitation.

D.3. Demonstrations & Clarifications Questions

The state reserves the right to request demonstration and questions clarifications from any or all responding bidders.

E. INSTRUCTIONS TO BIDDER

E.1. Introduction

- E.1.1. Prospective Bidders are urged to read this solicitation carefully. Failure to do so will be at the Bidder's risk. Provisions, terms, and conditions may be stated or phrased differently than in previous solicitations. Irrespective of past interpretations, practices or customs, proposals will be evaluated and any resultant contract(s) will be administered in strict accordance with the plain meaning of the contents hereof. The Bidder is cautioned that the requirements of this solicitation can be altered only by written amendment approved by the state and that verbal communications from whatever source are of no effect. In no event shall the Bidder's failure to read and understand any term or condition in this solicitation constitute grounds for a claim after contract award.
- E.1.2. By submitting a proposal in response to this RFP, the supplier represents they have read and understand the scope of services and have familiarized itself with all federal, state, and local laws, ordinances, and rules and regulations that in any manner may affect the cost, progress, or performance of the contract work.
- E.1.3. The failure or omission of any supplier to receive or examine any form, instrument, addendum, or other documents or to acquaint itself with conditions existing will in no way relieve any supplier from any obligations with respect to its proposal or to the contract.

E.2. Response Submission and Copies

- E.2.1. Supplier is to submit two (2) electronic copies of their complete response to include scanned images of the required completed and signed forms. Electronic copy can be in Word, Excel, or PDF format; but, is to be an unprotected document provided on a USB drive/flash drive/thumb drive.
- E.2.2. Faxed or emailed responses will not be accepted. Original hard copies are not required or preferred. This overrides hard copy submittal requirements of A.2.4. PDF is an acceptable format for solicitation responses. This overrides requirements of A.2.4
- E.2.3. Proposal Response Format

Proposals should be prepared in the format described below. Failure to comply with the specified format may lead to a supplier's proposal being declared non-responsive.

 - E.2.3.1. OSDE is especially concerned that the format of the proposal sequentially responds to the Scope of Service, Mandatory Requirements and Performance Activities that are to be addressed within the solicitation.
 - E.2.3.1.1. The supplier should restate the service or requirement and then state its response.
 - E.2.3.1.2. The supplier should assign consecutive page numbers in its response.

F. CHECKLIST

F.1. Vendor Response

Listed below is a checklist of items that are to be completed and returned with the proposal. This is not an all-inclusive list and it is the Vendor's responsibility to ensure that they submit all required and requested documentation:

- F.1.1. OMES Form CP 076 – Responding Bidder Information
- F.1.2. OMES Form CP 004 – Certification for Competitive Bid and/or Contract
- F.1.3. Response to all Proposal Requirements in Section C.2., C.3., and C.4.
- F.1.4. Vendor Payee form, if applicable. The Vendor Payee form is provided for the responding Supplier that is a new, non-registered payee. OMES Vendor Management requires the information in the attached form before payments can be made to the supplier.
- F.1.5. Two (2) electronic copies (E.2.1.)

G. OTHER

G.1. Questions

All questions regarding this solicitation must be submitted in writing and are to be emailed no later than **December 8, 2017 at 3:00 PM** Central Daylight Time. Questions are to be emailed to Leanna.Edmonds@omes.ok.gov. Questions received after this date will not be answered. If any questions are received, an amendment to this solicitation will be posted on the OMES website after this deadline listing all questions received and their answers. In addition, suppliers will be notified the amendment is on the OMES website. Please be sure to reference the solicitation number when emailing questions.

Any communication regarding this solicitation must be sent to the Contracting Officer listed above. Failure to do so (contacting the

agency directly), may result in the Supplier's proposal being deemed as non-responsive.

G.2. Attachments

- G.2.1.** Attachment A – Vendor Payee Form. The Vendor Payee form is provided for the responding Supplier that is a new, non-registered payee. OMES Vendor Management requires the information in the attached form before payments can be made to the supplier.

H. PRICE AND COST

H.1. Price Submission

- H.1.1.** Suppliers must submit a complete budget sheet for all years of this contract outlining all costs associated with this service.
- H.1.2.** Supplier must submit yearly pricing for each contract period:
 - H.1.2.1.** Date of Award thru September 30, 2018
 - H.1.2.2.** October 1, 2018 through September 30, 2019
 - H.1.2.3.** October 1, 2019 through September 30, 2020
 - H.1.2.4.** October 1, 2020 through September 30, 2021
 - H.1.2.5.** October 1, 2021 through September 30, 2022
- H.1.3.** Please list any other anticipated cost that will be associated with this service.



Amendment of Solicitation

Date of Issuance: 12/12/2017

Solicitation No. 265000344

Requisition No. 2650004914

Amendment No. 1

Hour and date specified for receipt of offers is changed: No Yes, to: _____ CST

Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent. Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery:

OMES Central Purchasing
5005 N Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105

or

Personal or Common Carrier Delivery:

OMES Central Purchasing
5005 N Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105

Leanna Edmonds
Contracting Officer

405 - 521 - 2133
Phone Number

Leanna.Edmonds@omes.ok.gov
E-Mail Address

Description of Amendment:

a. This is to incorporate the following:

Questions asked of this solicitation and their answers are below.

Q.1. Is there a specific grade band of teacher that you are wanting to train, or could it be pre K-12? Do you want to include administrators?
A.1. We will be targeting PreK-3 and administrators will be included in training.

Q.2. Is the plan to train all reading teachers across the state, or just a certain number per district?
A.2. No, we will be training teachers within districts and sites that are participating in the State Personnel Development Grant (SPDG) initiatives.

Q.3. What's the ratio of training days to coaching days that you are expecting?
A.3. This is an area that this consultant will help the SPDG Leadership team determine. This position will focus on helping the SPDG Leadership team develop professional development and an early literacy coaching framework. Literacy coaches will be hired in the 2018-2019 school year.

Q.4. Are you open to seeing blended with online training vs entirely face to face training?
A.4. Yes, but for this position there will be a lot of face-to-face consulting and training.

Q.5. Are you looking to build capacity by adding in a TOT model?
A.5. This is not an activity outlined in the SPDG initiatives at this time.

b. All other terms and conditions remain unchanged.

Supplier Company Name (**PRINT**)

Date

Authorized Representative Name (**PRINT**) Title

Authorized Representative Signature

From: Mary Dahlgren
To: [Leanna Edmonds](#)
Subject: Re: Clarification of bid response for 2650000344 - respond by noon on 2/16/2018
Date: Wednesday, February 14, 2018 4:43:34 PM
Attachments: [globalcerts.txt](#)
[globalcerts.html](#)
Importance: High

Hello Leanna,
Thank you for your questions.

1. For printing purposes, I am referring to any handouts that may be needed for any professional development sessions. I have included that in the bid because I don't know how many teachers or administrators I may be working with during this contract.
2. Handouts will be printed if they are necessary for a presentation or for an assignment for the schools in the cohort. I can use electronic handouts with the expectation that any thing that is necessary for notes or activities will be printed by the participants. This will be something to plan for when working with schools.

Please let me know if you need further clarification.

Sincerely,
Mary

Mary Dahlgren, Ed. D.
2112 N.W. 60th
Oklahoma City, OK 73112
405-202-4045
mary@tools4reading.com
www.tools4reading.com

On Feb 14, 2018, at 4:10 PM, Leanna Edmonds
<Leanna.Edmonds@omes.ok.gov> wrote:

Good Afternoon Ms. Dahlgren,

Thank you for your bid response to the State Department of Education's solicitation # 2650000344 for the SPDG Consultant. The evaluation team would like clarification on the last line of your bid response. You state "*Printing associated with this project will be the responsibility of the Oklahoma State Department of Education."

1. Could you please clarify which printing you are referring to?
2. How will you determine what needs to be printed and the quantity that needs to be printed?

Please respond by **noon on Friday, January 16, 2018**. If you have any questions, please

let me know.

Thank you,

Leanna Edmonds, CPO | Agency Acquisition Contracting Officer

p. 405-521-2133 | f. 405-522-1077

Central Purchasing | OMES

omes.ok.gov

<image001.png>

To participate in the OMES Procurement Satisfaction Survey, please click [HERE](#).

The contents of this electronic message, including attachments, are transmitted by the Information Services Division, a division of the Office of Management and Enterprise Services, an Oklahoma government agency, according to the Uniform Electronic Transactions Act, 12A O.S. 15-101 et seq. This message is intended for use by the named addressee only and may contain information that is confidential or private according to state or federal laws. **If you have received this electronic message in error, please notify the sender by a reply to sender only message, delete it completely from your computer and maintain confidentiality of the message.** Any unauthorized disclosure, distribution, or use of the contents of this message is prohibited and subjects the user to penalty of law.



Solicitation Cover Page

1. Solicitation #: 2650000344

2. Solicitation Issue Date: 12/1/2017

3. Brief Description of Requirement:

On behalf of the Oklahoma State Department of Education, the Office of Management and Enterprise Services Central Purchasing (OMES/CP) is requesting proposals for an SPDG Consultant.

All questions regarding this solicitation must be submitted in writing and are to be emailed no later than **3:00 p.m. CDT on December 8, 2017**. Questions are to be emailed to Leanna.Edmonds@omes.ok.gov. Questions received after this date will not be answered. An Amendment will be posted after this deadline listing all questions received and their answers.

NOTE: Please note that on a Request for Proposal (RFP), no pricing shall be released at the time of opening. Should a public opening be requested the only information to be released will be a list of bidders without pricing.

4. Response Due Date¹: December 19, 2017

Time: 3:00 PM CST/CDT

5. Issued By and **RETURN SEALED BID TO²**:

U.S. Postal Delivery Address: 5005 N Lincoln Blvd., Ste. 300

Oklahoma City, OK 73105

Common Carrier Delivery Address: 5005 N Lincoln Blvd., Ste. 300

Oklahoma City, OK 73105

Electronic Submission Address: N/A

6. Solicitation Type (type "X" at one below):

- Invitation to Bid
- Request for Proposal
- Request for Quote

7. Contracting Officer:

Name: Leanna Edmonds
Phone: 405-521-2133
Email: Leanna.Edmonds@omes.ok.gov

¹ Amendments to solicitation may change the Response Due Date (read GENERAL PROVISIONS, section 3, "Solicitation Amendments")
² If "U.S. Postal Delivery" differs from "Carrier Delivery", use "Carrier Delivery" for courier or personal deliveries



**Solicitation Notification for
Sales Department**

1. Solicitation #: 2650000344

2. Solicitation Issue Date: 12/01/2017

3. Brief Description: This solicitation is to select a qualified supplier to develop and implement a coaching cycle to support early literacy best practices for specified districts and sites through OK SPDG and SSIP for the Oklahoma State Department of Education.

Details for this solicitation are located and may be downloaded from the OMES website at:

<https://www.ok.gov/dcs/solicit/app/solicitationDetail.php?solID=3098>

4. Response Due Date: December 19, 2017

Time: 3:00 PM CST/CDT

* Amendments to solicitation may change the Response Due Date

5. Contracting Officer:

Name: Leanna Edmonds

Phone: 405-521-2133

Email: Leanna.Edmonds@omes.ok.gov



Certification for Competitive Bid and/or Contract (Non-Collusion Certification)

NOTE: A certification shall be included with any competitive bid and/or contract exceeding \$5,000.00 submitted to the State for goods or services.

Agency Name: Oklahoma State Department of Education Agency Number: 265

Solicitation or Purchase Order #: 2650000344

Supplier Legal Name: _____

SECTION I [74 O.S. § 85.22]:

A. For purposes of competitive bid,

1. I am the duly authorized agent of the above named bidder submitting the competitive bid herewith, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and state officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to said bid;
2. I am fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and have been personally and directly involved in the proceedings leading to the submission of such bid; and
3. Neither the bidder nor anyone subject to the bidder's direction or control has been a party:
 - a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b. to any collusion with any state official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between bidders and any state official concerning exchange of money or other thing of value for special consideration in the letting of a contract, nor
 - d. to any collusion with any state agency or political subdivision official or employee as to create a sole-source acquisition in contradiction to Section 85.45j.1. of this title.

B. I certify, if awarded the contract, whether competitively bid or not, neither the contractor nor anyone subject to the contractor's direction or control has paid, given or donated or agreed to pay, give or donate to any officer or employee of the State of Oklahoma any money or other thing of value, either directly or indirectly, in procuring this contract herein.

SECTION II [74 O.S. § 85.42]:

For the purpose of a contract for services, the supplier also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the supplier to fulfill any of the services provided for under said contract.

The undersigned, duly authorized agent for the above named supplier, by signing below acknowledges this certification statement is executed for the purposes of:

- the competitive bid attached herewith and contract, if awarded to said supplier;
- OR**
- the contract attached herewith, which was not competitively bid and awarded by the agency pursuant to applicable Oklahoma statutes.

Mary E. Dahlgren
Supplier Authorized Signature

12/19/17
Certified This Date

Mary E. Dahlgren
Printed Name

President, Tools 4 Reading
Title

405-202-4045
Phone Number

mary@tools4reading.com
Email

405-242-4925
Fax Number



Responding Bidder Information

Certification for Competitive Bid and Contract **MUST** be submitted along with the response to the Solicitation.

1. RE: Solicitation # 2650000344

2. Bidder General Information:

FEI / SSN : 27-1611150 Supplier ID: _____
Company Name: Tools 4 Reading

3. Bidder Contact Information:

Address: 6608 N. Western Ave. #301
City: Oklahoma City State: OK Zip Code: 73116
Contact Name: Mary Dahlgren
Contact Title: President
Phone #: 405-202-4045 Fax #: 405-242-4925
Email: mary@tools4reading.com Website: www.tools4reading.com

4. Oklahoma Sales Tax Permit¹:

- YES – Permit #: 1374363648
 NO – Exempt pursuant to Oklahoma Laws or Rules – Attach an explanation of exemption

5. Registration with the Oklahoma Secretary of State:

- YES - Filing Number: 3512259781
 NO - Prior to the contract award, the successful bidder will be required to register with the Secretary of State or must attach a signed statement that provides specific details supporting the exemption the supplier is claiming (www.sos.ok.gov or 405-521-3911).

6. Workers' Compensation Insurance Coverage:

Bidder is required to provide with the bid a certificate of insurance showing proof of compliance with the Oklahoma Workers' Compensation Act.

- YES – Include with the bid a certificate of insurance.
 NO – Exempt from the Workers' Compensation Act pursuant to 85A O.S. § 2(18)(b)(1-11) – Attach a written, signed, and dated statement on letterhead stating the reason for the exempt status.²

¹ For frequently asked questions concerning Oklahoma Sales Tax Permit, see <https://www.ok.gov/tax/Businesses/Index.html>

² For frequently asked questions concerning workers' compensation insurance, see <https://www.ok.gov/wcc/Insurance/Index.html>

7. Disabled Veteran Business Enterprise Act

- YES – I am a service-disabled veteran business as defined in 74 O.S. §85.44E. Include with the bid response 1) certification of service-disabled veteran status as verified by the appropriate federal agency, and 2) verification of not less than 51% ownership by one or more service-disabled veterans, and 3) verification of the control of the management and daily business operations by one or more service-disabled veterans.
- NO – Do not meet the criteria as a service-disabled veteran business.

How any date specified in this solicitation or award is changed: No Yes
Mary E. Dahlgren 12/19/17
 Authorized Signature Date
Mary E. Dahlgren President
 Printed Name Title

- (1) Sign and date this amendment with the solicitation number as being submitted.
- (2) If the supplier has already submitted a response, this acknowledgment must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date clearly on the front of the envelope.

ISSUED BY and RETURN TO:

V.P. Postal Delivery:
 OAS Contract Purchasing
 6005 N Lincoln Blvd., Ste. 300
 Oklahoma City, OK 73105
 or
Personal or Government Courier Delivery:
 OAS Contract Purchasing
 6005 N Lincoln Blvd., Ste. 300
 Oklahoma City, OK 73105

Learning Form #16
 Contracting Officer
 405-521-2103
 Phone Number
 Learning@okstateok.gov
 E-Mail Address

Description of Amendment:

1. The item encompasses the following:

Contractor asked of this solicitation and their answers are below.

Q 1. Is there a specific grade band of teacher that you are wanting to train, or would it be pre K-12? Do you want to include administrators?

A1. We will be targeting preK-3 and administrators will be included in training.

Q 2. Will you plan to train all existing teachers across the state, or just a certain number per district?

A 2. We will be training all existing teachers across the state and are participating in the State Personnel Development

Q 3. What is the main reason you are reaching out to us regarding this?

A 3. We are interested in training provided with existing training we have in place.

Q 4. Yes, but for our profit in this we will be a lot of time to this including our training.

Q 5. We are interested in training provided with existing training we have in place.

A 4. We are interested in training provided with existing training we have in place.



Amendment of Solicitation

Date of Issuance: 12/12/2017

Solicitation No. 265000344

Requisition No. 2650004914

Amendment No. 1

Hour and date specified for receipt of offers is changed: No Yes, to: _____ CST

Pursuant to OAC 260:115-7-30(d), this document shall serve as official notice of amendment to the solicitation identified above. Such notice is being provided to all suppliers to which the original solicitation was sent. Suppliers submitting bids or quotations shall acknowledge receipt of this solicitation amendment prior to the hour and date specified in the solicitation as follows:

- (1) Sign and return a copy of this amendment with the solicitation response being submitted; or,
- (2) If the supplier has already submitted a response, this acknowledgement must be signed and returned prior to the solicitation deadline. All amendment acknowledgements submitted separately shall have the solicitation number and bid opening date printed clearly on the front of the envelope.

ISSUED BY and RETURN TO:

U.S. Postal Delivery:

OMES Central Purchasing
5005 N Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105
or

Leanna Edmonds
Contracting Officer

405 - 521 - 2133
Phone Number

Personal or Common Carrier Delivery:

OMES Central Purchasing
5005 N Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105

Leanna.Edmonds@omes.ok.gov
E-Mail Address

Description of Amendment:

a. This is to incorporate the following:

Questions asked of this solicitation and their answers are below.

Q.1. Is there a specific grade band of teacher that you are wanting to train, or could it be pre K-12? Do you want to include administrators?
A.1. We will be targeting PreK-3 and administrators will be included in training.

Q.2. Is the plan to train all reading teachers across the state, or just a certain number per district?
A.2. No, we will be training teachers within districts and sites that are participating in the State Personnel Development Grant (SPDG) initiatives.

Q.3. What's the ratio of training days to coaching days that you are expecting?
A.3. This is an area that this consultant will help the SPDG Leadership team determine. This position will focus on helping the SPDG Leadership team develop professional development and an early literacy coaching framework. Literacy coaches will be hired in the 2018-2019 school year.

Q.4. Are you open to seeing blended with online training vs entirely face to face training?
A.4. Yes, but for this position there will be a lot of face-to-face consulting and training.

Q.5. Are you looking to build capacity by adding in a TOT model?
A.5. This is not an activity outlined in the SPDG initiatives at this time.

b. All other terms and conditions remain unchanged.

Continuation for Competitive

~~AAA~~ Tools 4 Reading

12/19/17

Supplier Company Name (PRINT)

Date

Mary Duhlgren

President

Mary E. Duhlgren

Authorized Representative Name (PRINT)

Title

Authorized Representative Signature

[Faint, mostly illegible text from the reverse side of the page, including terms and conditions.]

Mary E. Duhlgren
Mary E. Duhlgren
Mary E. Duhlgren



Vendor/Payee Form

Agency: OMES Vendor Management requires the following information for all new non-registered vendors (payees) before payments may be processed. Information is used to establish the payee in the State's PeopleSoft vendor file for payment and procurement activities.

DO NOT use this form for:

- > Garnishment Payees: Use **OMES Form GarnVendor**
- > State Employees: Use **OMES FORM Employee Vendor Request**
- > Vendors pending contract award to a solicitation released by the division of Central Purchasing or another Oklahoma state agency **MUST** first register online with the state unless exempt per statute. For additional information, please refer to **Central Purchasing Vendor Registration**.

AGENCY SECTION (To be completed by state agency representative):
 State agency should email completed and signed form to vendor.form@omes.ok.gov or fax to 405-522-3663.
VENDOR/PAYEE SECTION (To be completed by vendor/payee)

Please print legibly or type this information. Form must be completed and signed by authorized individual. Email or fax to requesting state agency.

Agency Name		Contact Name	
Phone #	Fax #	Email	
Agency Request To – Please select all applicable request types			
<input type="checkbox"/> Add New Vendor	<input type="checkbox"/> Update Existing Vendor	PeopleSoft 10-digit Vendor ID	_____
<input type="checkbox"/> Add New Address	<input type="checkbox"/> Change Address/Location	PeopleSoft Address #	_____ PeopleSoft Location # _____
<input type="checkbox"/> Change Vendor Tax ID	<input type="checkbox"/> Change Vendor Name	<input type="checkbox"/> Add Alternate Payee Name	_____ PeopleSoft Location # _____
<input type="checkbox"/> Other	Explain _____		
Vendor 1099 Reportable Status	Attention Paying Agency: Please check the Add box on the left if payments to this vendor/payee are represented by Account Codes listed on page 3 of this form. If the vendor is incorrectly showing as 1099 Reportable, check the Remove box. The PeopleSoft system requires specific details regarding the type of transaction. Please check the box that applies to this vendor:		
<input type="checkbox"/> Add:	<input type="checkbox"/> 1 - Rents	<input type="checkbox"/> 2 - Royalties	<input type="checkbox"/> 3 - Other Income
<input type="checkbox"/> Remove:	<input type="checkbox"/> 6 - Medical & Health Care	<input type="checkbox"/> 7 - Non-Employee Compensation	<input type="checkbox"/> 10 - Crop Insurance Proceeds
	<input type="checkbox"/> 14 - Gross Proceeds to an Attorney		

VENDOR/PAYEE SECTION (To be completed by vendor/payee)

Please print legibly or type this information. Form must be completed and signed by authorized individual. Email or fax to requesting state agency.

Payee Information: Please provide the requested information for the payee receiving funds from the Oklahoma state agency. All information should match U.S. Internal Revenue Service filing records for the business, individual or government entity receiving payment.

Name	Tools 4 Reading			Contact Name	Mary Dahlgren	
Payee Legal Name for Business, Individual or Government Entity as filed with IRS				Contact Title	President	
DBA Name				Phone #	405-202-4045	
Doing Business As "DBA", or Disregarded Entity Name if different than Legal Name				Fax #	405-242-4935	
Tax Identification Number (TIN) and Type:			27-1611150	<input checked="" type="checkbox"/> Federal Employer ID (FEIN) <input type="checkbox"/> Social Security Number (SSN)		
Business Address – Please provide primary business address as filed with the U.S. Internal Revenue Service						
Address	6608 N. Western #301			City	Oklahoma City	
State	OK	Zip+4	73116	Remittance Email	mary@tools4reading.com	
Optional Addresses – Please select address type as applicable						
Type:	<input checked="" type="checkbox"/> Remitting	<input type="checkbox"/> Ordering	<input type="checkbox"/> Pricing	<input type="checkbox"/> Returning	<input checked="" type="checkbox"/> Mailing	<input type="checkbox"/> Other:
Address				City		
State		Zip+4		Remittance Email		
Financial Registration: Please provide contact information for the Authorized Individual who can provide financial information used for ACH Electronic Funds Transfer payment processes. An email will be sent providing instructions for accessing the State of Oklahoma online registration system.						
Name	Mary E Dahlgren			Title	President	
				Email	mary@tools4reading.com	

The information below is requested under U.S. Tax Laws. Failure to provide this information may prevent you from being able to do business with the state, or may result in the state having to deduct backup withholding amounts from future payments.

U.S. Taxpayer Identification Number (TIN)

Federal Employer Identification Number (FEIN) 27-1611150 If none, but applied for, date applied _____

U.S. Social Security Number (SSN) 445-48-2625 If none, but applied for, date applied _____

Entity Filing Classification:

Domestic (U.S.) Sole Proprietor or Individual Domestic (U.S.) Partnership Domestic (U.S.) Corporation Type: _____

Limited Liability Company Type: _____

LLC Disregarded Entity: YES NO Must be verified by LLC's tax division. If applicable, parent name/tax id is required.

Domestic (U.S.) Other Explain: _____

Foreign (Non-U.S.) Sole Proprietor or Individual* Foreign (Non-U.S.) Partnership* Foreign (Non-U.S.) Type: _____

Foreign (Non-U.S.) Other* Explain: _____

FOREIGN VENDOR INSTRUCTIONS: * ADDITIONAL DOCUMENTATION IS REQUIRED.

Please submit the proper U.S. Internal Revenue Service (IRS) Form W-8, Certificate of Foreign Status. Select form below matching the payee's entity or individual description. Please refer to IRS for additional instructions (<http://www.irs.gov/pub/irs-pdf/fw8.pdf>).

- **Form W-8BEN:** Certificate of Foreign Status of Beneficial Owner for United States Tax Withholding and Reporting (Individuals). <http://www.irs.gov/pub/irs-pdf/fw8ben.pdf>
- **Form W-BEN-E:** Certificate of Status of Beneficial Owner for United States Tax Withholding and Reporting (Entities). <http://www.irs.gov/pub/irs-pdf/fw8bene.pdf>
- **Form W-8ECI:** Certificate of Foreign Person's Claim That Income is Effectively Connected With the Conduct of a Trade or Business in the United States. <http://www.irs.gov/pub/irs-pdf/fw8eci.pdf>
- **Form W-8EXP:** Certificate of Foreign Government or Other Foreign Organization for United States Tax Withholding and Reporting. <http://www.irs.gov/pub/irs-pdf/fw8exp.pdf>
- **Form W-8IMY:** Certificate of Foreign Intermediary, Foreign Flow-Through Entity, or Certain U.S. Branches for United States Tax Withholding and Reporting. <http://www.irs.gov/pub/irs-pdf/fw8imy.pdf>

This may exempt you from backup withholding. Form W-8 does not exempt you from the 30% (or lower percentage by treaty) non-resident withholding taxes. To claim this exemption, you must file IRS Form 8233 with us. For more information, refer to IRS Publication 519.

SIGNATURE - AND SUBSTITUTE IRS FORM W-9 CERTIFICATION

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below), and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification Instructions: You must cross out Item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, Item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement account (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN.

Mary Dahlgren

Digitally signed by Mary Dahlgren
Date: 2017.12.19 00:10:23 -06'00'

Signature of Vendor Representative or Individual Payee

Date

President

Title of Individual signing form for company

Vendor/Payee (Must be the same as Payee Name from page 1)

Proposal for SPDG Consultant
Solicitation # 2650000344

Applicant: Mary E. Dahlgren, Ed.D. President and Founder of **Tools 4 Reading**

C.1. Purpose

The intent of the Request for Proposal is to select a qualified supplier to develop and implement a coaching cycle to support early literacy best practices for specified districts and sites through OK SPDG and SSIP. The coaching cycle will guide and train site personnel on the development and implementation of early literacy best practices and fundamentals of literary instruction. The coaching cycle must include an ongoing professional development training model that supports building level coaches, external coaches, administrators, and classroom teachers that is literacy based and designed to meet the specific needs of the district.

It is my belief that teaching students to read and write is an honorable profession, one deserving of high quality professional development and support in schools. Today's educators are continually given directives that may distract from the important job of keeping current with research and effective teaching practices, practices that ensure high levels of achievement for all students. My vision is to provide access and support to collaborative processes that lead to high rates of reading and writing success for all students.

I believe deeply in the need to nurture teachers as we work towards equity and excellence for all students. Teaching is a demanding job and additional responsibilities are constantly added to teachers' workloads. We are convinced that teachers must be honored and cared for. We value the interpersonal relationships developed with teachers; as such, we maintain that consultation services designed to place the heart and mind of both teachers and students at the center of our collaborative work are the key to meaningful, sustainable change. Literacy initiatives often do yield change. However, we believe the key to sustaining this change is through the nurturing of the whole teacher throughout our work.

C.2. Scope of Service

State in response any experience I have with each requirement and exactly how I plan to comply with all requirements of this section providing detailed information and stating affirmatively my understanding of the requirements.

C.2.1. By attending and participating in monthly face to face meetings to coordinate OK SPDG III responsibilities and activities the coaching *consultant* will provide the opportunity to build relationships with all who are participating in this project.

My previous experience with the Oklahoma State Department includes attending meetings and providing training sessions with the Office of Instruction and Special Education Services. I was the lead trainer for Oklahoma's 58 statewide REACH Coaches from 2012 - 2014. I attended and led meetings, provided ongoing professional development, and went to school sites for consultation and support as needed. In addition, Tools 4 Reading, my company,

received a literacy grant through the OKSDE to provide coaching and professional development in over 100 schools across the state from 2014-2016. I hired and managed 8 literacy coaches during that time along with a budget over \$900,000. The data from the schools we worked with during this two year period showed significant gains in literacy and positive outcomes for 3rd grade students.

My career has been built upon providing high quality professional development in early literacy instruction and working with administrators, district, building level coaches, and classroom teachers. The knowledge of how to assess and teach foundational skills of reading and understanding the sequence of skills moving from easier to more difficult Learning to read is language based and requires a reader to not only learn to decode accurately and automatically, but to also comprehend text. Language comprehension means building background knowledge and gaining new vocabulary while reading a wide range of text. A skilled reader also understands text structure, how to make inferences and make sense of metaphoric phrases while integrating all of this information to previously learned information and

The professional development to be provided is program agnostic which allows for all teachers to gain the knowledge involved in the cognitive science of reading. Teachers need to understand how we learn to read in order to be able to teach any student with any curriculum. It is also imperative for teachers to understand how to assess and determine student needs and to be critical consumers in order to select the right materials for students based on needs.

***Please note, this is not to be confused with a professional development model that may be purchased from a vendor designed to provide PD statewide.**

C2.2. Attend and participate in monthly OK SPDG III leadership/planning meetings and work sessions.

As the coaching consultant, I will attend and participate in monthly leadership/planning meetings. This will provide the leadership team time to review results and feedback and discuss areas of need for coaches and schools within the project.

Planning at this time may involve discussion around current research articles to deepen the knowledge of all participants in the project. A list of academic research articles and other reading materials or pod casts will be provided when details are finalized.

C2.3. Consultant will attend quarterly SPDG III sponsored or related activities as planned by the director of this project.

Consultant will work with all participants to set goals, provide quality checks of goals, and work to determine where we are achieving success and how to replicate that success. Consultant will also work with the team to analyze shortcomings and how to correct the course of action in order to provide the best services possible to all students.

A key feature of my work, and what sets me apart from other consultants, is the targeted professional development provided within the classroom through the use of instructional supports for teachers. It is this immediate decision-making and application of knowledge and practice for all students that is the hallmark of an expert teacher.

The Educational Trust published a comprehensive research and position statement titled *Good Teaching Matters – How Well-Qualified Teachers Can Close the Gap* (1998). It is a common assumption that many people think that schools cannot help children who are damaged by poverty and discrimination catch up to their more privileged peers. In fact, The Educational Trust published *It's Being Done* (2007), which has proven that students in those circumstances are being helped in numerous situations across the country. Significant evidence exists suggesting that teacher quality is a powerful predictor of student success (Sanders, 1996, Joshi, Spear-Swearling, Brady, Gillis, Smith, Lavalette, Liss-Bronstein, Lowe, North, Russo, & Wilder, 2009). Research supports the contention that: "They (expert teachers) have a deep preparation in the subjects they teach, actively engage their students in learning activities, conduct frequent assessments and checks on learning, engage in meaningful and ongoing professional development, and have a desire – a passion – to do the work they do." (Minner, 2001, p.2)

However, high-quality professional development is necessary but not sufficient. Principal leadership is key to managing the effective implementation of instructional focus, collegial collaboration, and challenges that arise during the change process. The effectiveness of professional development efforts is dependent upon the assistance and follow-up support provided by school leaders (Anderman, Smith, & Belzer, 1991), principals, reading coaches, and teachers themselves.

Professional development is the cornerstone of my collaboration with schools. As a highly qualified, knowledgeable consultant I provide research-based instruction, which is individualized to meet the specific needs of all literacy stakeholders. Embedded professional development occurs through regular collaboration with colleagues, support from reading coaches, and individual teacher reflection on their instructional practices and student learning.

Collaboration, professional learning communities, collegiality, and sharing are topics of targeted focus and are increasingly included in school improvement efforts (DuFour, 1998; Schmoker, 1999; Darling-Hammond, 1997; Fullan, 2001). Effective teamwork through collaboration is viewed as critical to purposeful change in schools. I will promote a sustained collaboration staff development structure that focuses teachers on discussion, study, problem solving, and practice as they share responsibility for high levels of student learning (Guskey, 2000).

Consultant will work with schools to establish a regular collaborative, data driven, and agenda-guided meeting format for teachers. These meetings focus on literacy issues specific to whole group and intervention in the elementary grades professional staff development content is reviewed, revisited, and strengthened. The model serves to provide collegial support as schools strive to improve reading skills of all students

C.2.4. Consultant will consult and provide training for all participants involved in the project and beyond.

My area of expertise is providing professional development and consultation. I have worked in 29 states, multiple school districts, and individual schools. For the last 16 years I have worked as a national and international Language Essentials of Reading and Spelling (LETRS®) trainer under the direction of Dr. Louisa Moats, researcher and literacy expert. I have also written and presented many talks at national conferences around the United States including *The Society for*

the Scientific Study of Reading, The International Dyslexia Association, and the annual Plain Talk for Teachers Conference. Future speaking engagements include:

- Pennsylvania Department of Education, Bureau of Special Education Annual Conference, June 13-15, 2018
- Iowa Area Education Agency Literacy Symposium, June 18-19, 2018
- Kansas Multi-Tier System of Supports (MTSS) Symposium on September 5-6, 2018
- Australia Speaking Tour, October 2018

Coaching consultant will:

- Keep the focus of all training and in-class coaching focused on student-centered goals
- Clearly identify training goals, communicate these to the teachers, and use them to guide their instruction and presentations.
- Improve teacher knowledge of scientifically based reading research and practice.
- Demonstrate application of identified reading instruction methods in classrooms.
- Teach important concepts in workshop model with the opportunity for teachers to directly transfer the information into instruction while our consultants observe and debrief on the instructional strategies used in the classroom

C.2.5. Scheduling all professional development training and supervise coaching assignments and report to the OSDE SPDG.

In order for all schools to achieve excellence we must have the following:

- High quality instruction
- High expectations for all students
- Embracing data and knowing about individual students along with groups
- Constant reflection on practice and adjustment as needed
- Transparent accountability for parents, community members, and future citizens
- Making decisions that are good for kids, not focused on adult schedules and needs.
- Use every minute of the school day wisely
- Leverage community resources – outside volunteers and mentors (open door policy)
- Provide extra time for students beyond the school hours, especially struggling students, and that they receive the best instruction possible.
- Establish an atmosphere of respect for students, teachers, parents, anyone entering the building.
- Caring for children and their future which includes wanting to provide the best for each child.
- Principal is constantly in the classrooms, involved in instructional planning, learning with teachers, and has a relationship with students.
- Leaders in the school are recognized and given responsibility (because the principal cannot do it all)
- Quality of teaching staff receives a great deal of attention
- Time to meet and plan is protected for teachers
- Observations of other classrooms is encouraged and time is provided

- Professional development is to deepen content knowledge, understanding, or pedagogical skill
- New teachers need to be trained on programs in the building and this is a constant
- High quality office staff is proud of the school and it is apparent when anyone enters the building.
- The environment of the building feels welcoming and child focused.
- Hard work to teach and expect students to learn is the way the school functions

C.3. Performance Activities

State in response any experience with each requirement and exactly how it plans to comply with all requirements in this section, providing detailed information and stating affirmatively its understanding of the requirements.

C.3.1. Coaching consultant will work with SPDG staff to provide literacy based training for external coaches, site coaches, administrators, and classroom teachers.

Professional Development Topics:

Coaching consultant will provide follow up and an individualized package of workshop topics designed to fit a wide variety of ascertained student and teacher needs. This design is flexibly utilized throughout work with schools and districts. Topics include, but are not limited to:

1. The Reading Brain
2. Assessment and Planning Targeted Instruction: The Outcomes Driven Model
3. Phoneme Awareness
4. Oral Language Development
5. Explicit, Systematic, Sequential Phonics instruction
6. Morphology – Multi-syllable Word Work
7. Fluency in all components of reading and writing
8. Comprehension
9. Writing
10. The Small Reading Group

C.3.2. *Coaching consultant will assist SPDG staff in analyzing literacy data and developing a plan of action to train and implement a coaching cycle.*

Teachers will:

- Be guided during professional staff development to identify key learning, strategies, and teaching methods to utilize to improve their reading instruction.
- Work together with colleagues to answer key questions that provide a working plan to guide the implementation and assessment of their reading instruction.
- Identify student-growth resulting from professional development.
- Meet regularly and utilize an efficient data driven collaborative format.
- Observe consultants modeling instructional practices followed by opportunities for debriefing together.

Principals will:

- Attend all professional development trainings and data meetings led by *Consultant*
- Conduct structured walk-throughs and engage in frequent conversations with teachers and reading coaches around reading and writing instruction.
- Monitor implementation of new concepts and strategies presented by consultants and applied in classrooms

C.3.3. Coaching consultant will evaluate the literacy coaches and literacy professional development of OK SPDG III activities.

Assessment/ Evaluation

- *Consultant* will establish communication with teacher teams initially face to face, through site visits, and continue via email, Skype and conference calls.
- Agendas from the collaborative meetings will provide evaluation of the collaborative process.
- Coaches and principals will attend collaborative meetings, observe and record behaviors, and note participation and attitudes.
- Data meetings will be used to track student response to targeted and enhanced instructional practices.
- Surveys will be used to assess usefulness of professional development and levels of implementation.
- Individual schools will work collaboratively with *Consultant* to develop appropriate goals.

C.3.4 Coaching consultant will evaluate the literacy coaches and literacy professional development of OK SPDG III activities.

The following 5 Step Approach is a recommendation to consider as a structure for this project to evaluate the progress of literacy coaches and professional development of SPDG activities.

1. Program design, delivery & intensity

- Review of current programs and if necessary, the need to reallocate funds to determine the effective delivery of programs
- Assessment – all staff know how and what assessments are used and for what purpose.
- PD – all professional development is focused on teacher needs and student outcomes. Job embedded professional development is necessary to transfer research to classroom best practices.
- Guided PLCs - related to current professional development and reading evidence based research.
- Coaching – cognitive, side-by-side, job embedded professional development are all techniques that will be used.

2. Assessment of children and settings

- What screenings are in place?
- Is everyone trained to administer and interpret the assessments?
- Are student groupings targeted based on assessment measures?

- How are data being managed and monitored?
- Is progress monitoring in place and consistently reviewed?

3. Professional Education

- Are all staff members expected to increase their professional knowledge?
- Is pursuit of a higher degree valued?
- How do we increase teacher (adults) capacity to assess and support children's language and reading development?

4. Curriculum: language rich, rigorous, and engaging instruction delivered by well-prepared teachers.

5. Partnerships with families: expand and strengthen work with families across learning settings and within communities.

C.3.5. Coaching consultant will be responsible for overseeing coaches' performance and analyzing literacy data.

Assessment/ Evaluation

- *Consultant* will establish communication with teacher teams initially face to face, through site visits, and continue via email, Skype and conference calls.
- Agendas from the collaborative meetings will provide evaluation of the collaborative process.
- Coaches and principals will attend collaborative meetings, observe and record behaviors, and note participation and attitudes.
- Data meetings will be used to track student response to targeted and enhanced instructional practices.
- Surveys will be used to assess usefulness of professional development and levels of implementation.
- Individual schools will work collaboratively with *Consultant* to develop appropriate goals.

C.4. Mandatory Requirements

C.4.1. Years of experience – minimum of three (3) years prior experience in education with a focus in literacy and professional development.

I have been in the field of education for 34 years. My career started as a 6th grade teacher in Guthrie, OK. Several students in my classroom were non-readers and it was that situation that ignited my desire to learn how to teach children to read. I did not feel equipped to do it with my degree in Elementary Education from a state university. I began to seek out successful teachers and schools where literacy outcomes were above the norm. This desire would guide the majority of my life's work. Once I received training in "how to teach reading" and "what happens in the brain when one becomes a fluent reader", it became my mission to provide high quality professional development for teachers to learn research based strategies for effective, direct, and explicit instruction in literacy. By empowering educators through professional development in scientifically researched instruction, focused on essential literacy

knowledge and skills, we can ensure the ability of most, if not all students are learning to read with comprehension. I moved from Guthrie, OK to a small school with the mission of teaching dyslexic students to read. After spending three years working with students' one-on-one and in small groups, I began to train teachers. Providing professional development as a Master Instructor at Payne Education Center and then becoming the Executive Director launched me into the field of dyslexia and working with struggling readers. I continued tutoring dyslexic students and taught children as young as six years old, as well as adults, how to read. My passion for teacher training continued, as did my learning and study of the research coming out of many large-scale studies funded by the US Department of Education. It was during this time that I met my mentor, Louisa Moats. Louisa is the writer of LETRS and a researcher who has published books and numerous articles on the topic of language and literacy. Louisa Moats asked me to join her team of national LETRS trainers in 2002. It is during this phase of my career that I have provided professional development to thousands of teachers from coast to coast and in Australia.

C.4.2. Experience in literacy coaching and experience in literacy consultation.

My first experience with coaching was during the roll out of *Reading First*, a federal education program, in 2001. I began working with many Oklahoma elementary schools at the time. It was the *National Reading Panel Report (2000)* that established five components of reading, phonemic awareness, phonics, fluency, vocabulary and comprehension, which helped to form this federal program. These components became known as the "big five" of reading. These are the key elements which research studies found to have the greatest impact in reading instruction. By explicitly teaching these components and combining them in daily practice, we have evidence of effective literacy practices. My goal is to work with both state and building level coaches to teach the scope and sequence of these components to all teachers. This will build confidence in classroom instruction, increase the focus for special educators as they provide appropriate interventions, allow school leaders to have professional learning communities and sustain the culture that is necessary for our schools to be successful.

One of my current projects is working with state coaches in Ohio, with a focus on Pre-K through 3rd grade students to improve reading outcomes. The first year of this initiative, 2015, involved in-depth training of state literacy coaches in the five components of reading, writing and data analysis. Statewide teacher training began in 2016 and is continuing through 2018. All schools participating in the project show significant gains in reading and most schools have moved from failing grades on state report card results to average and above average as evidence of improvement. One important note from my experience in working with so many schools is the key ingredient of leadership. Regardless of the knowledge and skill of a coach, without the support of leadership it is almost impossible to make gains. Meeting with administrators and having 'crucial conversations' will determine the success of this project. Leadership needs to be involved from the beginning by participating in professional development and data meetings with their staff. As we analyze data together, it will be necessary for administrators to have the tools to talk with teachers and coaches about the information used to guide daily instruction. Principals should know that literacy outcomes in kindergarten and 1st grade predict the results of 3rd grade high-stake testing. There is no longer a mystery regarding how to teach a child (or adult) to read. The earlier a student is performing on grade level, the more likely they are to meet all criteria for graduating on time and being well prepared for life. Memorandums of understanding will be drafted to establish expectations of leaders and teachers.

C. 5. Contract Monitoring – Monthly literacy meetings that address coaching reports and data analysis.

C5.1.

Assessment/ Evaluation

- **Consultant will establish communication with teacher teams initially face to face, through site visits, and continue via email, Skype and conference calls.**

- **Agendas from the collaborative meetings will provide evaluation of the collaborative process.**
- **Coaches and principals will attend collaborative meetings, observe and record behaviors, and note participation and attitudes.**
- **Data meetings will be used to track student response to targeted and enhanced instructional practices.**
- **Surveys will be used to assess usefulness of professional development and levels of implementation.**
- **Individual schools will work collaboratively with Consultant to develop appropriate goals.**

C.6. A recommended coaching cycle is outlined below.

Plan for Year One

1st visit - August: Beginning of school or summer

- **Formal Professional Development (PD content based on school's needs: Foundational, brain research, phoneme awareness, phonics, data interpretation and targeted instruction)**

2nd visit – September: First DATA visit - end of Sept or early October after initial benchmark assessment has been completed.

- **Day One: Classroom observations with principal and reading coach; review school-wide data and trends.**
- **Days Two and Three: Grade level ½ day meetings (K-1 day two, 2-3 day three) that include:**
 - **1½ hours of data analysis**
 - **1 hour of action planning, create action plan for children not meeting benchmark. May include introduction of phonics lesson plans or other strategic resources**
 - **1 hour of short PD based on needs, this would align with action planning and differentiated lessons.**
- **Classroom observations based on PD. Teachers begin to apply what they have learned and planned.**
- **Debrief with principal and others to identify areas of focus until the next visit.**

3rd visit - Mid-November: Data meeting to review progress monitoring and short PD session based on needs observed.

- **Days One and Two: follow model of 2nd visit data with targeted PD meetings**
- **Days Three and Four: Observations based on PD, individual teacher visitations, modeling of teaching practice, and debrief**

4th visit - End of January: Data meetings with MOY data and student effectiveness data if available.

- **Days One and Two: follow model of 2nd visit data/PD meetings**
- **Days Three and Four: Observations, classroom instructional modeling, brief PD sessions, and debrief**

5th visit - Beginning to middle of March: Review progress-monitoring data, plan appropriate instruction

- **Days One and Two: follow model of 2nd visit data/PD meetings**
- **Days Three and Four: Observations based on PD and debrief**
- **Day Five: Summer School and sustaining efforts planning**

6th visit - End of May/Beginning of June

- **Day One: Review EOY data as a group – celebrate the year**
- **Days Two, Three and Four: formal professional development based on needs**
- **Plan summer programs that reverse the summer slide**
- **Outline professional development for the next school year.**

Plans for Years 2 and beyond will be determined based on a needs assessment at the conclusion of year one.

H. Price and Cost

H.1.1 Suppliers must submit a complete budget sheet for all years of this contract outlining all costs associated with this service.

H1.2. 1. **Date of Award thru September 30, 2018**

\$6,000 per month

- **Organizing and vetting of external coaches**
- **Face to face meetings (leadership, committee, external coaches, local coaches, teacher data meetings, etc.)**
- **Analysis of data**
- **Team and individual meetings with external coaches**
- **Team and individual meetings with site-based coaches**
- **Onsite professional development for schools in project**
- **Sustainable model for coaching (see coaching cycle C.6.)**
- **Electronic communications daily**
- **Online modules for state to store and share as districts join project**
- **Recommendations for scientifically based reading research articles and books related to specific components of reading**

October 1, 2018 – September 30, 2019

\$72,000

- **Face to face meetings (leadership, committee, external coaches, local coaches, teacher data meetings, etc.)**
- **Analysis of data**
- **Team and individual meetings with external coaches**

- Team and individual meetings with site-based coaches
- Onsite professional development for schools in project
- Sustainable model for coaching (see coaching cycle C.6.)
- Electronic communications daily
- Online modules for state to store and share as districts join project
- Recommendations for scientifically based reading research articles and books related to specific components of reading

October 1, 2019 – September 30, 2020 **\$72,000**

- Face to face meetings (leadership, committee, external coaches, local coaches, teacher data meetings, etc.)
- Analysis of data
- Team and individual meetings with external coaches
- Team and individual meetings with site-based coaches
- Onsite professional development for schools in project
- Sustainable model for coaching (see coaching cycle C.6.)

October 1, 2020 – September 30, 2021 **\$72,000**

- Face to face meetings (leadership, committee, external coaches, local coaches, teacher data meetings, etc.)
- Analysis of data
- Team and individual meetings with external coaches
- Team and individual meetings with site-based coaches
- Onsite professional development for schools in project
- Sustainable model for coaching (see coaching cycle C.6.)

October 1, 2021 – September 30, 2022 **\$72,000**

- Face to face meetings (leadership, committee, external coaches, local coaches, teacher data meetings, etc.)
- Analysis of data
- Team and individual meetings with external coaches
- Team and individual meetings with site-based coaches
- Onsite professional development for schools in project
- Sustainable model for coaching (see coaching cycle C.6.)

All travel expenses are included in monthly budget.

*Printing associated with this project will be the responsibility of the Oklahoma State Department of Education.

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

Print or type
See Specific Instructions on page 2.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Tools 4 Reading, LLC	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input checked="" type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <small>Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.</small> <input type="checkbox"/> Other (see instructions) ▶ _____	
4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
5 Address (number, street, and apt. or suite no.) 6608 N. Western #301	Requester's name and address (optional)
6 City, state, and ZIP code Oklahoma City, OK 73116	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number											
OR											
Employer identification number											
2	7		-	1	6	1	1	1	5	0	

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here	Signature of U.S. person ▶ <i>Mary Dahlgen</i>	Date ▶ <i>1/30/17</i>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.
Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.*
- By signing the filled-out form, you:
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
 2. Certify that you are not subject to backup withholding, or
 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
 4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.