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September 8, 2021

ADDENDUM #2 to the University of Florida ITN22NH-110 Book Distribution, Technology, Marketing/Communications, Logistics and Other Services to Support the New Worlds Reading Initiative for The Lastinger Center for Learning scheduled to be opened on **September 15, 2021 3:00 PM** at the University of Florida, Elmore Hall Conference Room, Radio Road, Gainesville, Florida.

This addendum shall be considered part of the Contract Documents for the above mentioned **ITN22NH-110** as though it had been issued at the same time and incorporated integrally therewith. Where provisions of the following supplementary data differ from those of the original document, this addendum shall govern and take precedence. All other terms, conditions, and regulations will apply.

This addendum consists of:

1. **Responses to technical questions and inquires submitted prior to 5:30pm, August 31, 2021.**

Sincerely,

Nicola Heredia, Director
Procurement Services

Please acknowledge receipt of Addendum #2 by signing below, and returning this addendum with your proposal. Failure to include addendum with your proposal may result in rejection.

_____   _____
Signature   Company Name

_____
Email Address

_____   _____
Company Address   City/State/Zip

The Foundation for The Gator Nation

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ITN22NH-110 Book Distribution, Technology, Marketing/Communications, Logistics and Other Services to Support the New Worlds Reading Initiative for The Lastinger Center for Learning

Q1.   What does success look like for year 1 in terms of Lot 5 engagement?

A1.   Success in the communications and public relations arena for year one would include accomplishment of the following:
* A comprehensive communications and PR plan is developed and being implemented
* Logo design and branding has been established leading to brand recognition among schools, families, and the general public
* A fully developed website is active that includes a family enrollment portal, family resources, information for businesses on tax credit opportunities, etc.
* The New Worlds Reading Initiative is featured in both print and digital media outlets, locally and statewide
* A social media presence is created for the New Worlds Reading Initiative and is actively engaging schools and families
* Promotional and family literacy events are held throughout the state
* Local communities are aware of the program

 Proposal

Q2.   Can you provide guidance on a funding (contract amount) range per year for this five-year initiative as we develop our budget?

A2.   An overall initiative budget is in the process of being drafted, and we aim to make the appropriate amount of resources available to achieve success in each area of work attended to by this ITN. That said, we would defer to the expertise of our vendors in suggesting the appropriate level of financial resources that is necessary for each area of work.

Q3.   What is the planned award date for the selected vendor and are there any additional steps before the vendor can begin work?

A3.   The anticipated award date is October 2021. Awarded vendor(s) must register with UF's vendor maintenance team: https://www.fa.ufl.edu/directives/supplier-portal/

Q4.   Is there any budget spreadsheet or template format you prefer we use for the *Pricing for Services* section?

A4.   There is no preferred budget spreadsheet or template. Please provide pricing information in appropriate format in tab 5 of response.

Q5.   What is the importance of the December 2021 deadline for the first book to be delivered?

A5.   This is a statutory requirement and therefore extremely important. Book delivery must begin in December 2021, and there is no flexibility on this date.

Q6.   Can you please clarify the words in the bindings and marking requirement on page 18 (provided below)? We are under the impression that all tabs, including the lot explanations under Tab 3, constitute one full proposal (meaning one large comprehensive file). Thus, we are looking to clarify what constitutes a "proposal 2" or "proposal 3" etc."

> <u>4.1.3   Bindings and Marking</u>
> *Vendors shall ensure that the original and each copy are individually bound. When submitting more than one (1) proposal, vendors shall ensure that units are clearly marked; for example, as "Original of Proposal One", "Copy One of Proposal One", "Original of Proposal Two", "Copy One of Proposal Two", and so on.*

A6. One full proposal consists of all required tabs and may contain bids for multiple Lots. Proposals should be clearly marked and identified for clarity during the review process. For this solicitation there will not be a proposal 2 or 3 submitted, however lots being responded to <u>must</u> be identified.

Q7.   Are we correct to state that the final submission consists of only one printed hard copy, which contains manual signatures, and one flash drive digital submission? Do you require additional printed copies?

A7.   As per section 4.1.1, one original hardcopy (containing manual/wet signatures) and one electronic copy should be submitted.

Q8.   What would be the anticipated timeline for contracting of bids?

A8.   We intend to contract for services as quickly as possible after negotiations and the award is made. Accepting UF's Standard Terms and Conditions will increase the speed in establishing these contracts.

 Book delivery

Q9.   The ITN indicates students will receive 9 books December 2021-June 2022 which would equate to 7 months. Can the University clarify – is the vendor to deliver 9 books over 9 months or 7 books over 7 months?

A9.   For the 2021-2022 school year, students will need to receive nine books over this seven-month period (December 2021-June 2022). This means that students may receive more than one book for one or more months.

Q10.   Is the requirement to ensure one book per month or a total of 9 books for participating students? For example, for students who enroll after the first book delivery (i.e., December), do they receive one book per remaining month for the program through June or is the vendor required to deliver all 9 books in the remaining program period?

A10.   Enrolled students will need to receive nine books each school year. This means that students may receive more than one book for one or more months.

Q11.   In years two through five, will the book delivery timeline mirror year 1 (starting December and running through June) or do you anticipate a shift in the delivery period to coincide with the start of the new school year each year?

A11.   In years two through five, the book delivery timeline will be October through June of that school year. Year one (2021-2022 school year) is the only year in which deliveries are conducted from December through June.

Q12.   How many students do you expect to register for book delivery the first year? Is there an anticipated number of family members per family or household that would log on? 1:1 or Many:1 on the front end?

A12.   The number of eligible students is currently estimated at 544,000. Actual enrollment will depend on the collective success of the Center and its partners in communicating the opportunity to families across the state. We anticipate 1-2 family members would log on from each household with the ability to manage multiple children with that log on.

Q13.   Do you need to track entire households? Would multiple students from one household be eligible for the program? What data besides household use would you be interested in?

A13.   Yes, we will need to have the ability to track how many households are participating in the program in addition to individual students. Multiple students from one household could be eligible for the program given that they are in kindergarten through fifth grade and meet the eligibility criteria defined in law. The ability to track enrollment by school district and geographic location is ideal.

Content

Q14.   Can you confirm whether the University will handle translation of parent materials and communications (book-specific, general, text messages, and welcome kit letters) in languages beyond English including Spanish and Haitian Creole?

A14.   Translation services is a preferred qualification of the communications vendor.

Q15.   How do you anticipate books and topics to be populated in the system? Will there always be the same books, will they change over time or be removed? Is there a number of books that are available and capped?

A15.   Students/families must, at minimum, have the opportunity to select book topics and genres from a list. We envision that while some books stay consistent, there may be change over time to remove books and/or add books as students' preferences and interests change. Currently, we do not have a cap for the number of books available to students.

Q16.   Can you provide the estimated percentage of the population that will need books in different languages – English versus Spanish and Haitian Creole? And what percentage do you anticipate will need different book formats- braille, audio, large print vs standard?

A16.   With available FSA and demographic data, we estimate that 23% of eligible students are English Language Learners and .05% of students are estimated to require alternate formats due to visual impairment.

Q17.   Can you list all necessary languages that should be available? Are English, Spanish and Haitian Creole the only languages required?

A17.   English, Spanish and Haitian Creole are the preferred languages with an interest in including bilingual books in these languages as well. We are open to including additional languages as available.

Participant Information and Enrollment

Q18.   Can you provide an estimate of the number of eligible students anticipated broken down by grade or grade range?

A18.   Approximately 544,000 students are eligible for the program. Below is an estimate of the eligible students by grade.
- Kindergarten – 83,000
- First Grade – 90,000
- Second Grade – 90,000
- Third Grade – 92,000
- Fourth Grade – 96,000

- Fifth Grade – 93,000

Q19.   Is there any existing research on demographics for the types of students/families that are at a below-grade level?

A19.   Based on available data, we estimate that of the eligible students, 25% are White, 38% are Hispanic, and 30% are Black, and 4% are two or more races. Additionally, we estimate that of the eligible students, 70% are economically disadvantaged, 3% are homeless, 23% are English Language Learners, and .05% have visual impairments.

Q20.   Can you provide an estimated number of children you anticipate being served each year of the program for the five-year term?

A20.   There are currently an estimated 544,000 children eligible for the program. We aim to serve as many eligible children as possible.

Q21.   What eligibility verification information is provided to the vendor to ensure that families who enroll are indeed eligible?

A21.   We are working closely with school districts to determine the exact enrollment verification process.

Q22.   Does the Enrollment Database and Registration Platform need to integrate with school district information systems in each county or would it be through a CSV file or similar? If integrations, would that be 67 separate information system integrations? How frequently would these integrations need to be updated and what type of data would be populated? Would the integration be bi-directional or just receiving enrollment data?

A22.   Ideally, the Enrollment Database and Registration Platform would integrate with school District student information systems or single sign on platforms. Each district selects its method for student information system integration with sign-on services and other services, and a few single sign-on services are used by the majority of Florida districts. Data to be populated include: student name, student number, student mailing address, parent name, parent contact information, student achievement data, etc. Ideally the integration would be bi-directional for enrollment verification purposes.

Q23.   What other data systems or platforms need to be integrated into the Enrollment Database and Registration Platform? Does the procurement/book system need to be integrated or via CSV download?

A23.   CSV download is a minimum requirement of the system and the integration of data systems (School District Single Sign On Platforms, Student Information Systems, Book Procurement System) is ideal.

Q24.   How would and at what frequency would the student address data be provided to the vendor for the Enrollment Database and Registration Platform?

A24.   Ideally, the student address information would be entered when the student enrolls and then only updated if/when the student moves and has a new mailing address. If integrated with school districts' student information systems, this could be updated through those integrations as an address is updated with the school district or manually updated by a parent/caregiver. If integrated with the student information systems, addresses would ideally be confirmed with the SIS each month prior to book delivery to reduce delivery errors.

Q25.   How often do you anticipate students/families will log on to select books/topics? Monthly? Quarterly? Etc. Will there need to be emails/notifications to alert when it's time to select books?

A25.   Students/families must be able to select topics/genres at least annually at the beginning of the school year prior to the first book shipment. Providing students/families opportunities to adjust their selections throughout the year is preferred. Email and text notifications will be sent to enrolled families to remind them to select their book topics.

Q26.   What type of reporting is expected from the Enrollment Database and Registration Platform?

A26.   We will need to know how many students are enrolled in the program, how many households are enrolled in the program, number of family log-ons, and percentage breakdown of topic/genre selection. We would need the ability to disaggregate this data based on school district, school enrollment, household location, student demographics, and student performance and achievement data, if applicable.

Q27.   What type of users and how many users would need to access the backend of the Enrollment Database and Registration Platform? Are there any other types of users that would be necessary outside of UF? What roles would staff need to accomplish in the system?

A27.   There may be users outside of UF that would need access to the backend of the system, such as vendor partners. Therefore, vendors should consider this possibility as they submit their proposals.

Q28.   How will access be provisioned? Will the system need to dedupe users? Is there any approval process needed for users?

A28.   Families will require the ability to create accounts or to sign on using existing accounts such as Google or Facebook, so they can make book selections. The system will need to deduplicate users because in the initial year, students will be enrolled by their families, and in

subsequent years schools will provide enrollment data. Enrollments from those sources will require reconciliation. As students move among districts and among schools, including charter schools, that use different enrollment processes, each student's enrollment should be current. We are working closely with school districts to determine the exact enrollment verification process.

Q29.   Is the list expected to grow/change/edit? If so, with what frequency? Who from the schools would be responsible for updating the list?

A29.   The list of eligible students will change throughout the year as progress monitoring occurs. School districts will be responsible for updating the list of eligible students on a regular basis.

Applicant vetting/eligibility

Q30.   Will a pre-qualified list of all eligible students be provided to the vendor? If yes, who will provide it and by what date? What data attributes will be provided and in what format and with what frequency? If no, what is the expectation on specific criteria for eligibility of the child for the program during registration?

A30.   A pre-qualified list of eligible students will not be available. School districts have been notified by the Department of Education that they should identify eligible students in public and charter school in kindergarten through fifth grade based on the following criteria:

Kindergarten - Grade 3: Any student who has been identified as having a substantial deficiency in reading if any of the following criteria are met in accordance with Rule 6A-6.053 subsection 12:
- The student scores at the lowest achievement level/benchmark as identified by the publisher during a universal screening period, on an assessment listed in the district's approved District K-12 Comprehensive Evidence-based Reading Plan;
- The student scores at the lowest achievement level/benchmark as identified by the publisher during progress monitoring administration at any time during the school year, on an assessment listed in the district's approved District K-12 Comprehensive Evidence-based Reading Plan; or
- The student has demonstrated, through consecutive formative assessments or teacher observation data, minimum skill levels for reading competency in one or more of the areas of phonological awareness; phonics; vocabulary, including oral language skills; reading fluency; and reading comprehension.

Grades 4-5: Any student who scored either a 1 or 2 on the prior school year's English Language Arts Florida Standards Assessment

Public Relations

Q31.   Outside of the launch event, does the University have a vision for how many smaller awareness events should be held each year?

A31.   These details will be determined through ongoing strategic planning and the overall communications and public relations plan.

Q32.   Are there any specific branding/accessibility requirements for the platform?

A32.   All branding and materials must be ADA compliant. Initial branding preferences center focus on a space theme to reflect the idea of how books allow children to access all kinds of new worlds.

Q33.   What type of information systems would the school boards have that we could gain access to for marketing lists? If we would not be provided access, how would the information be shared?

A33.   Data sharing agreements with school districts may allow UF to receive information on eligible students to inform marketing, but specific details on what and how information will be shared will be defined by each agreement and is unknown at this time. We will rely on school districts, schools, and local community organizations to assist in the dissemination of marketing materials if direct contact information for families is not provided.

Q34.   Would we need to get the families to opt-in to a campaign, or would we be able to work under the umbrella of the school board?

A34.   Families must opt-in to the program by completing an enrollment form for their eligible student. We will be working closely with each district to provide appropriate marketing toolkits to promote the program and recruit families.

Q35.   Who would our main point of contact be as a Lot 5 vendor?

A35.   The Assistant Director of Strategy, will serve as the main contact for Lot 5 vendors at this time. Points of contact may change as internal UF staff are hired and onboarded.

Q36.   Would we be expected to communicate with all school boards/districts for marketing efforts and/or toolkits, or with a central individual/department?

A36.   UF will manage all communications with school districts and schools. Each school district will identify a point of contact for the New Worlds Reading Initiative.

Q37.   For the collateral and supporting pieces, will all copy/content be provided, or will the vendor be expected to provide that?

A37.   Copy being developed for initial launch will be provided but UF will also look to the Public Relations vendor to support copy development at times as well.

Q38.   How many events do you expect to have throughout the year?

A38.   These details will be determined through ongoing strategic planning and the overall communications and public relations plan.

Q39.   What level of event management support do you anticipate?

A39.   We will be hiring internal staff to support event management but are looking for vendor(s) to strategically plan and provide logistical/implementation support to ensure success of the event.

Q40.   Are we restricted to a particular CMS to build the web portal?

A40.   Wordpress is currently being used to host the website but we are not restricted to this.

Q41.   Do you have a data collection (CRM) platform in place?

A41.   An initial data collection platform will be temporarily used for year one enrollment but will not be the long term data collection platform.

Q42.   Have social media profiles already been set up for this initiative?

A42.   We will be securing social media handles in the next 1-2 weeks.

Q43.   Are you aware of, or should we expect any compliance related issues with advertising/marketing to this demographic?

A43.   All advertising/marketing should be ADA compliant, able to be translated as appropriate, and align with branding that will be developed.

Q44.   Have you identified target verticals for corporate sponsors? Do you have a financial goal for sponsorships/donations?

A44.   There is a yearly cap for corporate contributions that can qualify for tax credits. That cap is $10 million for state FY 21-22, $30 million for state FY 22-23, and $50 million for subsequent state fiscal years. Businesses seeking to receive a tax credit for their contributions, must have one of the following tax liabilities:

- Insurance premium tax
- Corporate income tax
- Severance taxes on oil and gas production
- Alcoholic beverages tax on beer, wine, and spirits
- Self-accrued sales tax liability of direct pay permit holders

Q45.   Do we need to develop what a sponsorship package would entail, or just provide design/graphics for the collateral?

A45.   The UF Lastinger Center seeks strategic support in determining what should be included within a sponsorship package, along with design and graphics for accompanying collateral.

Budget

Q46.   What is the budget that has been approved or allocated for the Enrollment Database and Registration Platform?

A46.   An overall initiative budget is in the process of being drafted, and we aim to make the appropriate amount of resources available to achieve success in each area of work attended to by this ITN. That said, we would defer to the expertise of our vendors in suggesting the appropriate level of financial resources that is necessary for each area of work.

Q47.   Is there a predetermined budget for the Lot 5 portion?

A47.   An overall initiative budget is in the process of being drafted, and we aim to make the appropriate amount of resources available to achieve success in each area of work attended to by this ITN. That said, we would defer to the expertise of our vendors in suggesting the appropriate level of financial resources that is necessary for each area of work.